



Ministry of
Children and Family
Development

Community and Residential Information System - CARIS

**User Manual – PSDHH
April 2010**

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1 General Information and Procedures

CARIS (Community and Residential Information System) is a case management application developed for the Provincial Services Division of the Ministry of Children and Family Development, British Columbia, Canada. The development of this new information management tool enables the accurate and appropriate tracking of clients, services and outcomes and helps to ensure accountability. CARIS provides a new information management tool for CYMHS, the Maples, Youth Forensic Psychiatric Services and Provincial Services for the Deaf and Hard of Hearing.

CARIS is the result of a desire on the part of the Ministry to enhance service delivery by providing open and transparent relationships, improving accountability and facilitating case planning.

The following goals underlie the development of the CARIS system.

Enable communities to develop and deliver services within a consolidated, coherent, community-based service delivery system.

Provide a consistent means for community service providers, including ministry clinicians and workers, to develop and communicate case plans for shared clients.

Support common goals and outcomes, facilitating business process analyses to effect improvements in treatment and care.

Enhance integrated case planning and support community and family capacity to care for children.

Provide a community-based service delivery system that promotes innovation and shared responsibility.

Enhance a community-based approach to service delivery.

CARIS is distributed as a real-time on-line application and its underlying data model is built on the Public Health Conceptual Data Model from the Centers for Disease Control in Atlanta, Georgia and HL7 standards.

1.1 HOW TO USE THIS MANUAL.

This Manual is divided into seven sections:

Section 1. General Information and Procedures

Provides a general overview of the system, what it does, and a discussion on security and privacy. It then provides detailed procedures for performing the common actions such as logging in, working with “context” and so on.

Section 2. Client and Case Management

Provides step by step instructions for performing the daily client/case management operations.

Section 3. Functions

Provides a description and methods of use of specific functions such as alerts, notes, files & documents, referrals, forms, reports and so on.

Section 4. Agency Specific Functions

Descriptions of functions which are specific to a particular agency.

Section 5. Training Plan and Scenarios

Provides training scenarios and self-evaluation charts.

Section 6. Glossary

Provides a glossary of terms used in this manual.

Section 7. Index

Each section contains descriptive text, usually a screenshot of what you may expect to see when you perform an action, and action commands to perform the operation. The commands are in the form of numbered text, i.e.

- 1) Click on “OK”.
- 2) Fill in the text box.
- 3) Click on “close”.

Note that the screenshots shown may differ slightly from the ones you actually see due to the sample names, agencies or descriptions we have used for demonstration purposes. System updates may also require modifying the screen display.

Section 2 describes processes – how to accomplish certain things like “Start a New Case” or “Create a New Client”, while Section 3 describes the Functions - what things do and how to do them, like “Alerts”, “Notes” or “Attach a Document”.

Warning dialogue boxes will appear to query whether you really want to perform an action, or if you are performing an incorrect action. If you get a browser error notice (Page cannot be Displayed), click the “refresh” icon in your browser toolbar to clear it and return to the Main page.

1.2 THE CARIS SYSTEM

CARIS is a clinically useful and comprehensive case management system enabling clinical teams to work collaboratively on a client’s case and to maintain a longitudinal case history of all activities of client service. This practice creates efficiencies in service, enables decision support and provides an auditable record of all activities associated with a client. It assists in providing the right information to the right person at the right time to make the right decision.

CARIS provides on-line assessments, bed management, observations, activities tracking, alerts, waitlists and more and as such is a clinically useful tool.

1.3 WHAT CARIS DOES

CARIS is an on-line secure daily management tool for clinical teams and administrators to assist them in managing their numerous case files.

The following list identifies some of the capabilities and functions of CARIS:

Create new cases

Add members to cases

Add affiliates to cases

Bed management functions

**Create
Name
Reserve
Add a Room or Bed
Assign a Bed
Track activities concerning a case
Perform a variety of assessments
Track outcomes
Create notes
Access a detailed client record and summary
Generate reports that help identify trends and issues
Generate case reports
Maintain eligibility and wait lists**

1.4 SECURITY AND PRIVACY

Security and Privacy are essential in the proper care of client information. Security and privacy are different, though complementary, elements and need to be differentiated.

Security is a matter of doing many small things properly including developing and following policies, regulations, and procedures and appropriately handling paper and passwords. Security also involves securing the hardware network, the database and the transactions online.

Security for CARIS is the responsibility of the Province of B.C. and is handled by standard government security protocols at CITS (Common Information Technology Services), who are the “hosts” for the CARIS application.

Security is also the responsibility of the users. Every user of the system is responsible for maintaining the confidentiality of their ID and password, and to prevent unauthorized access by locking down their workstation when they leave it unattended.

The CARIS application resides within the SpanBC network behind the government firewall. Users will access CARIS through IDIR or BCeID authentication. While CARIS is an internet-based web application, security is protected by making it accessible only by authorized users with the correct name, password and domain information.

Privacy is a different matter. Privacy relates to the relationship a client and the clinician have to the client’s data. Privacy specifically relates to data and the management and access of that data in the course of clinical care by authorized users.

CARIS provides tightly controlled case-based privacy which enables a case manager to determine who is able to view and contribute to a client’s case.

CARIS handles privacy in a number of ways including the provision of a complete audit trail which enables the review of all accesses, activities and interactions on a client’s case. CARIS’ ability to share data across program and “office” boundaries is controlled by the policies for data sharing of each organization.

Forms in CARIS are not documents that can be e-mailed; but are centralized and accessed remotely by authorized individuals on an as-needed basis. All accesses, changes and views of the client forms are recorded and auditable.

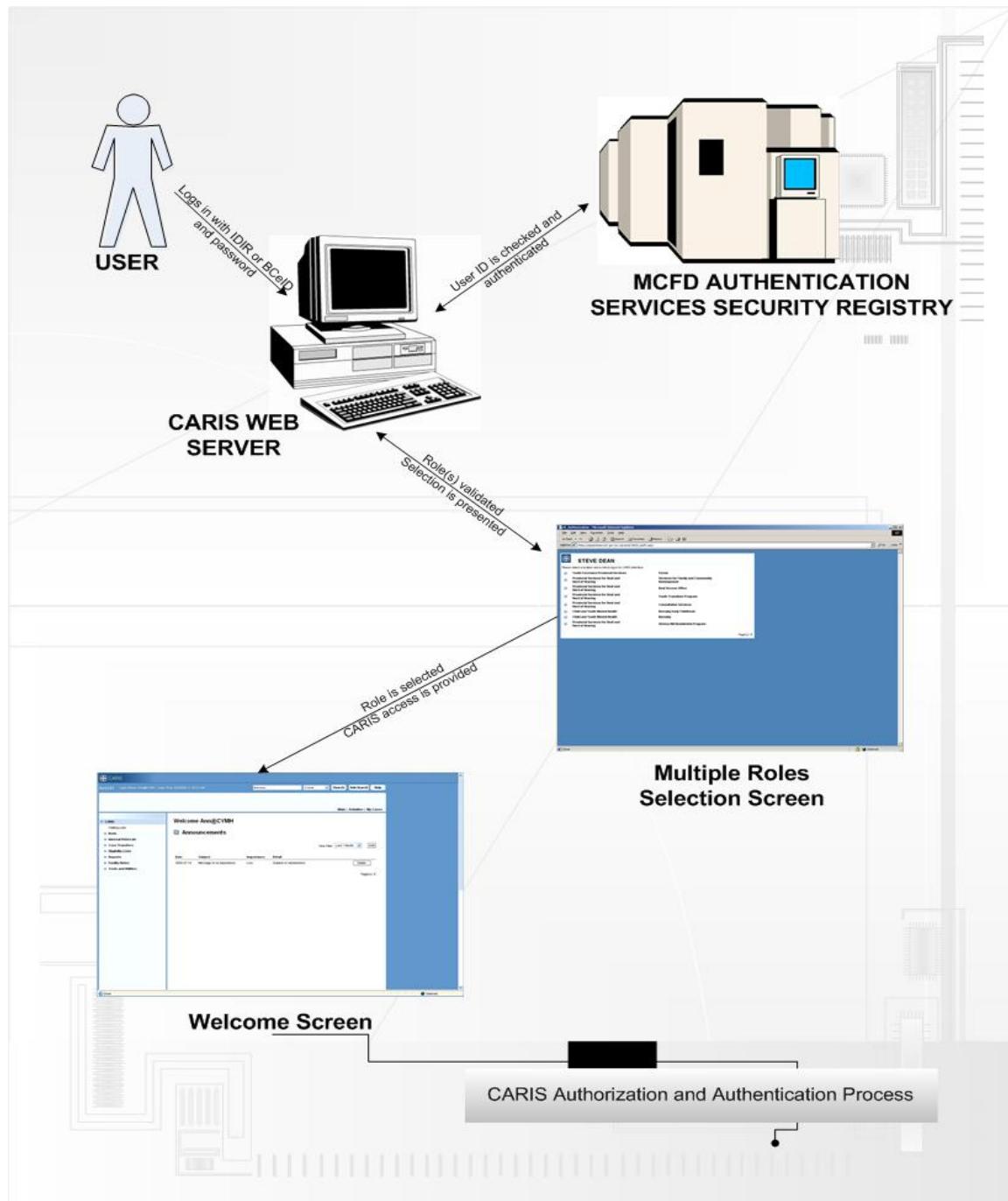
CARIS’ ability to share data across program and “office” boundaries is controlled by the policies for data sharing of each organization.

1.5 BASIC PROCEDURES

1.5.1 LOGGING IN

Authentication and Authorization Process

Access to CARIS is limited to persons who have a valid BCeID or IDIR account, and have been provided with specific roles within CARIS. The authorization for access and the role descriptions are provided to CARIS by MCFD. The User must also have a valid password specifically for CARIS access. The process is shown in the following diagram.



For a User to gain access to CARIS:

Either:

Type in the URL for the CARIS website in the User's web browser,

<http://caris.mcf.gov.bc.ca>

or

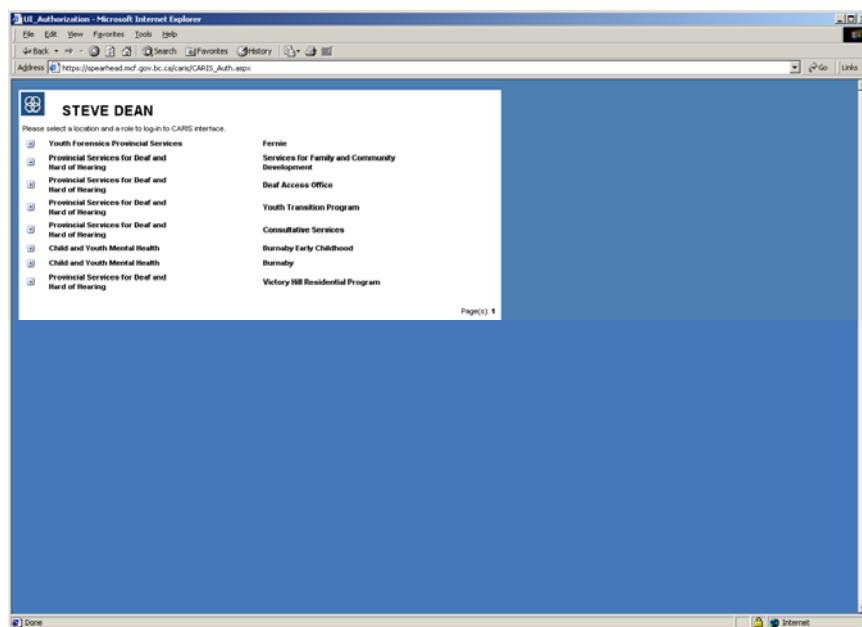
Click on the Icon on the User's desktop 

A User ID/Password request will display.



When you type in your IDIR or BCeID number and your password, the CARIS server contacts the MCFD Authentication Services Security Registry which checks and validates your ID and Password. If both are correct, the Registry confirms that you have access privileges.

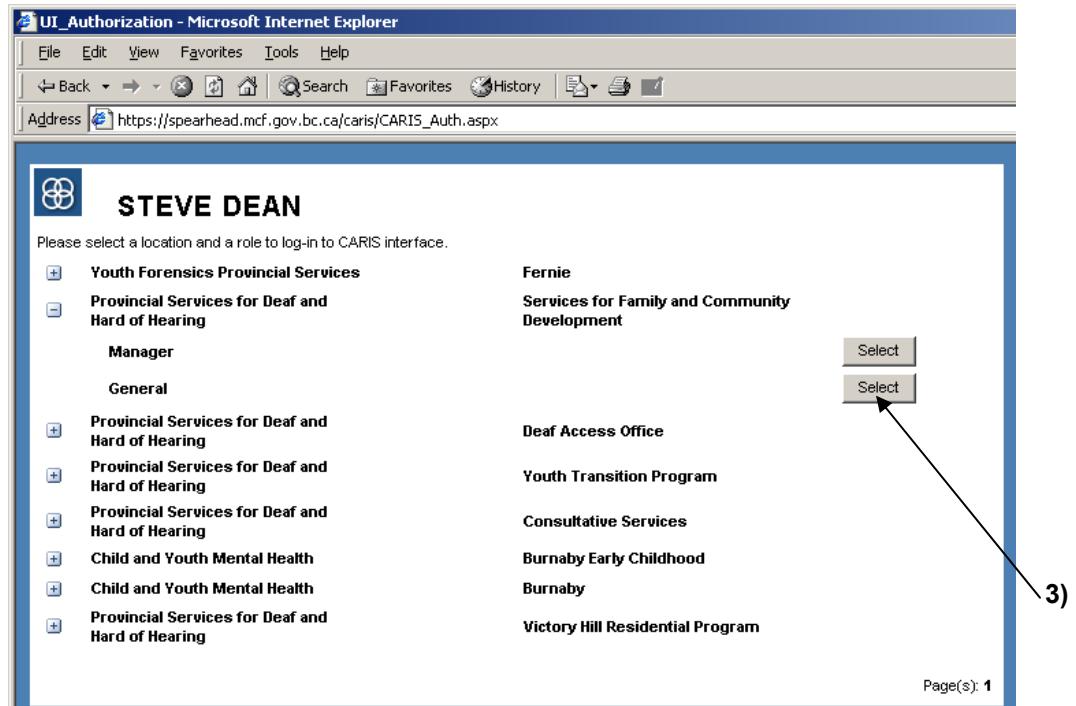
CARIS then matches your ID with your preauthorized role(s) and displays the Role Selection page. You can expand any of the roles to display more information, and to select your option.



The screenshot shows a Microsoft Internet Explorer window with the title "UI_Authentication - Microsoft Internet Explorer". The address bar displays the URL: https://speakeeasy.mcf.gov.bc.ca/caris/CARIS_Auth.aspx. The main content area is titled "STEVE DEAN". A message at the top says: "Please select a location and a role to log-in to CARIS interface." Below this, there are two columns of checkboxes:

Left Column Roles	Right Column Details
<input type="checkbox"/> Youth Forensic Provincial Services	Ferris
<input type="checkbox"/> Provincial Services for Deaf and Hard of Hearing	Services for Family and Community Development
<input type="checkbox"/> Provincial Services for Deaf and Hard of Hearing	Deaf Access Office
<input type="checkbox"/> Provincial Services for Deaf and Hard of Hearing	Youth Transition Program
<input type="checkbox"/> Provincial Services for Deaf and Hard of Hearing	Consultative Services
<input type="checkbox"/> Child and Youth Mental Health	Burnaby Early Childhood
<input type="checkbox"/> Child and Youth Mental Health	Burnaby
<input type="checkbox"/> Provincial Services for Deaf and Hard of Hearing	Victory Hill Residential Program

At the bottom of the page, there is a "Page(s):" dropdown menu set to "1".



Choose your option and:

Click "Select"

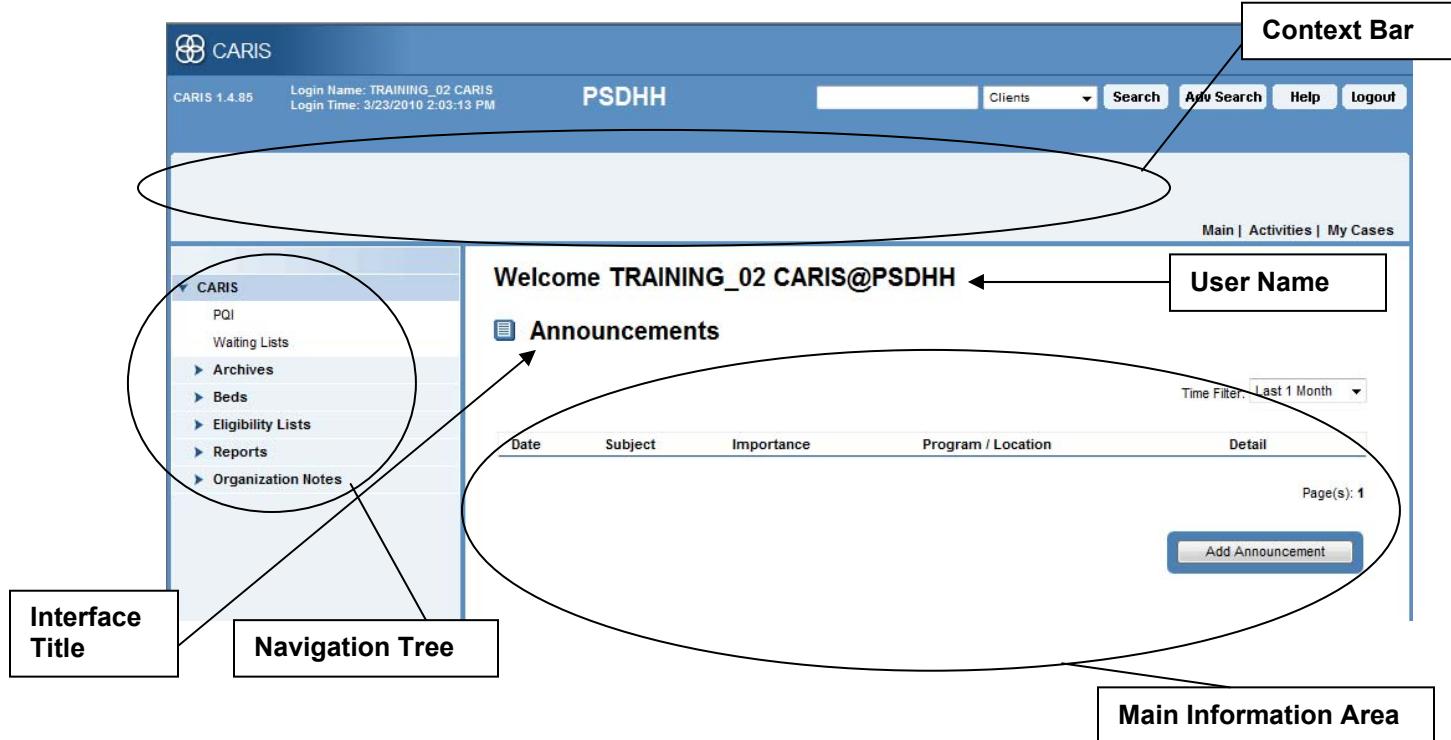
Your Main page will display and you can now use the system.

NOTE: Your screen display may include the browser functions unless you have closed them. DO NOT USE the browser functions to navigate through CARIS, particularly the "Back" or "Forward" buttons. They will not work properly since they are browser functions, not CARIS functions. Always use the navigation aids and functions displayed on the CARIS display to navigate the system.

For example, instead of the "Back" Button on your browser, clicking "Cancel" on your open window will take you back to the previous window and cancel any data input or operation you were performing in the open window.

1.5.2 YOUR SCREEN DISPLAY

When you log on to CARIS, you will see your personal desktop. It will show your User Name. You will only be able to access your own cases, information and activities. The system does this automatically for security and privacy reasons. You will be able to search the entire database for persons, but will only be able to view and edit their Client Details.



1.5.3 CONTEXT BAR

The Context Bar is the area where the Client Name and (if he/she has one) the Case Description will display. This is important, and is described in more detail below.

1.5.4 NAVIGATION TREE

The expandable list of functions that can be performed using CARIS. These functions change based on user and the context. I.e., case context, client context, systems context. More on context below.

1.5.5 MAIN INFORMATION AREA

This is where all the information, tables, windows and data display.

1.5.6 INTERFACE TITLE

Indicates what function or area in the system you are presently accessing.

1.5.7 SEARCH AND ADVANCED SEARCH

These functions provide you with the capability of finding persons or organizations already in the database. (Section 1.8)

1.5.8 HELP

The Help file will take you to a pdf version of the User Manual.

1.5.9 MAIN

Clicking on this item will bring you back to your main, or home, page. The Main page is your personal CARIS desktop.

1.1.1

CONTEXT

Context is **an important concept** to understand while using CARIS. Context defines where in the system you are, i.e, context defines what functions are available to use and whether you are able to add/view information to a case, a client or provide notifications system wide. System functions become available or not depending on what context you are in.

There are three contexts:

CARIS (system)
Client
Case

In metaphorical terms it's like the following: CARIS context is the filing cabinet; Client context is the client's set of file folders with his/her name and address tabs; and Case context contains the information in an individual client case file folder and enables you to read or add to the details of the worker/client interaction.

CARIS context is simply logging in and having access to reports and notifications prior to selecting a single client record for use. Administrators for instance, may spend most of their time in CARIS context producing reports.

Client context orients the system function around a client and enables the user to have access to the client's demographic information and list of cases. This is a higher level view of the client shared amongst workers and provides no clinical details.

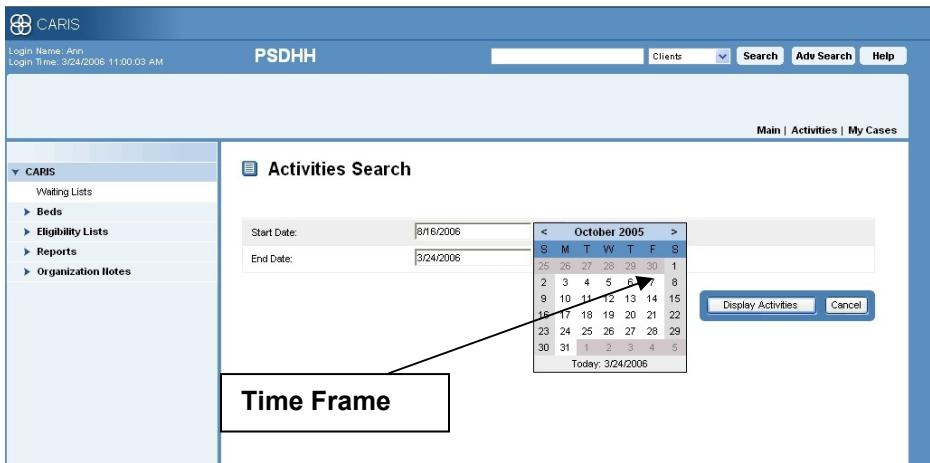
Case context orients the system to provide functions for management of the individual case. A client may have more than one case; but case context provides user functions for one case at a time.

The current context can be seen at anytime by viewing the context bar. The “Client in Context” will be to the left, and the “Case in Context” will be shown to the right.

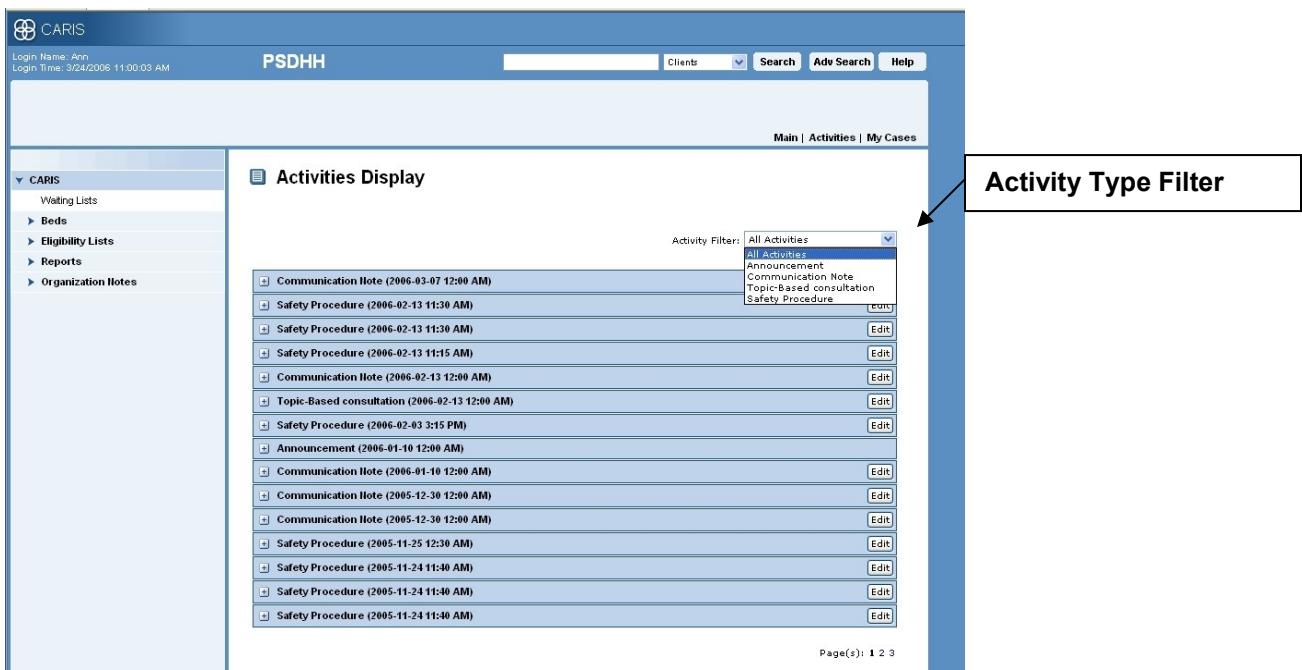


1.5.10 ACTIVITIES

Clicking on “Activities” will produce a list of all the activities in which you have been involved during the time frame selected and concerning the activity type selected from the filter. If a Case is “In Context” (Section 1.8) then only those activities connected to that Case will be displayed. If no Case is “In Context” the activities displayed will only be those of a general or administrative nature and will NOT include Case specific activities. Note that there will always be a “Client” in context if there is a “Case” in context, but you can have a “Client” in context without a Case. There is no “Activities” function associated with just a Client.



With no Case in context, you can access any non-case specific activities by defining the time frame and clicking “Display Activities”.



1.5.11 MY CASES

Clicking on “My Cases” will display a complete listing of all the Cases in which you, the User, are involved.

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with links for 'Clients', 'Search', 'Adv Search', and 'Help'. Below the navigation bar is a main content area titled 'My Case List'. On the left, there's a sidebar with a tree view under 'CARIS' containing nodes like 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main content area displays a table of cases with columns: Case Type, Case Status, My Case Role, Client Id, Client Name, and Start Date. There are four rows of data. To the right of the table is a 'Case Status Filter' dropdown menu with the following options: All, Pre-Admit, Active, Discharge, and Referral. At the bottom right of the content area, it says 'Page(s): 1'. A large 'View' button is located on the right side of the page, with two arrows pointing towards the 'Case Status Filter' dropdown from different angles.

You can shorten the list by using the Case Status filter, and you can see the details of a specific case by clicking on “View”. The Case Summary will display, with various options available. (Section 2.16 to 2.20)

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with links for 'Clients', 'Search', 'Adv Search', and 'Help'. Below the navigation bar is a main content area titled 'Dry Dew' and 'Deaf Access Office (18285) Pre-Admit'. On the left, there's a sidebar with a tree view under 'CARIS' containing nodes like 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main content area displays a 'Case Summary' table with various details. At the bottom of the summary table, there is a row of buttons: 'Reject Referral', 'Accept Referral', 'Cancel Case', 'Admit', 'Discharge', and 'Close Case'.

1.6 CLIENT CONTEXT

The term “In Context” as used in this system means the Client and/or Case whose names appear in the Context Bar. (Section 1.7) Changes can only be made to a Client’s file when the Client is “In Context”. This is indicated by the client’s name being displayed on the Context Bar.

See also Section 1.5.9 – “Context” for a description of what “Context” means and how it works.

Client Name

When performing ANY functions that involve a specific client, make sure that the client is “IN CONTEXT” before doing so.

You will note that a new row of functions displays under the Client’s name when a Client is “In Context”

1.6.1 CASES

Clicking on this item opens a window listing all the cases involving the Client who is “In Context”.

Case List

Case Type	Case Status	My Case Role	Start Date
Administration	Pre-Admit	Case Manager	2005-08-23
Community Development Administration	Active	Case Manager	2005-08-23
Consultative Services	Pre-Admit	Case Manager	2005-08-25
Deaf Access Office	Active	Case Manager	2005-08-23
Victory Hill Residential Program	Referral	Case Manager	2005-08-23

New Referral

1.6.2 DETAILS

Clicking on “Details” opens the description of the Client’s demographic and other information.

Client Details (Farrington, Michael)

Basic Demographics

Family Name:	Farrington	Given Name:	Michael
Middle Initial:	...	Preferred Name:	Mike
Aliases:	...	Gender:	Male
Date of Birth:	10-Mar-36	Date of Death:	...
CARS ID:	1000053		

Extended Demographics

Address Book

Relationships Address Book Edit Client

Clicking on the “+” will expand the “Extended Demographics” window.

Client Details (Farrington, Michael)

Basic Demographics

Extended Demographics

Status in Canada:	Canadian Citizen	Employment Status:	Part Time
Ethno-cultural Background:	American	Education Level:	Post Secondary
Preferred Language:	English	Education Type:	Other
Lang Spoken at Home:	English	Primary Living Arrangement:	None Of The Above
Religious Practice:	Pagan	Household Composition:	Lives Alone
Aboriginal Origin:	Non-aboriginal	Dental Plan:	...
Reservation Status:	...	PEH:	...
Band Status No.:	...	PNH:	1324567891
Disability:	Hard Of Hearing	SIN Number:	...
Identifying Marks:	...	Guardianship Status:	Self

Address Book

Relationships Address Book Edit Client

Clicking on the “+” will expand the “Address” window. (See Section 1.6.4)

1.6.3 RELATIONSHIPS

This item opens a window which displays the information about any other people involved with the client on a “Relationship” basis. (See Section 2.11 – Creating a Relationship)

Relationships (Farrington, Michael)

Person	Type	Relation	Start Date	End Date	Its
Farrington, Steve	Family	Brother	2005-08-30		<input type="button" value="Edit"/>
Reginald, David	Family	Brother	2005-08-04	2005-09-11	<input type="button" value="Edit"/>
Reginald, David	Family	Cousin	2005-09-12		<input type="button" value="Edit"/>
Marceau, Jason	Social	Friend	2005-08-26		<input type="button" value="Edit"/>

Page(s): 1

New Relation

1.6.4 ADDRESS BOOK

This tag takes you to the Client's pertinent addresses, telephone numbers and e-mail address(s). You may add as many addresses etc as you require. If there are many different items, you can reduce the ones that display by using the Location Type Filter which will then display only e-mails, addresses or telephone numbers.

Location	Person	Use	Start Date	End Date	Note
Address:	21-2345 downtown ave, Victoria, BC, V8W3S2, CA				(Active)
Email:	mike@planetearth.ca				(Active)
Phone:	(250) 888-5678				(Active)

1.6.5 CLOSE

Closes the window and removes the Case from the “Context” bar, returning you to your Main Page with the Client still in context.

1.7 CASE CONTEXT

Some clients may be involved in more than one case, either as clients or as members or contacts. When performing any functions related to a specific case, make sure that the correct Case is also “In Context” before proceeding. (See 1.5.9 & 1.6.1)

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Active	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	Aug-25-2005
Case Manager:	One, Ann_3	Est. Discharge Date:	
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

You will see that a row of functions displays under the Case description. These elements provide information specific to that case.

1.7.1 SUMMARY

Provides basic information about a particular Case, and provides the option to alter the case status (“Discharge” the Client from the Case). (see previous screenshot).

1.7.2 PARTICIPANTS

Clicking on “Participants” displays a list of all “Members” who are attached to the particular Case. Members are other authorized people who are involved in the Case and who have access to the case files. Also displayed are “Affiliates” who are all the people who are affiliated with the Case. These are people who have an interest in some way in the Client and/or the Case but who do NOT have access to the case files.

CARIS

Build 0.58 Login Name: Ann@CYMH Login Time: 8/22/2005 2:08:14 PM

Michael Farrington A

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Participants List

Members

Name	Case Access	Start Date	End Date	Action
One, Ann_3	Case Manager	2005-08-04		Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	Remove

Page(s): 1

Affiliates

Name	Role	Start Date	End Date	Action
Reginald, David	General	2005-08-22		Remove
Dean, Steve	General	2005-08-22		Remove

Page(s): 1

1.7.3 CASE PLAN

The Case Plan contains the Goals and Objectives regarding the Client and this Case. There can be more than one Goal and more than one Objective for each Goal. (See Section 2.22)

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 8/13/2005 3:12:44 PM

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Youth Placement [In-Progress]

Goal Details:

Priority:	PRIORITY_1	Status:	Active
Critical Date:	2005-09-12		
Start Date:	2005-09-12	End Date:	
Note:	Michael needs a job right away to pay his rent		

[Edit](#) [Delete](#) [Create Objective](#)

OBJECTIVE: Help him retain his own apartment [In-Progress]

Priority: PRIORITY_4 Status: Pending Activity

Critical Date:	2005-09-13	Approach:	Psychological
Start Date:	2005-09-13	End Date:	
Note:	He needs to keep his apartment where he has lived for three years and where he feels safe.		

[Edit](#) [Delete](#) [Create Action](#)

Page(s): 1

[Create Goal](#)

1.7.4 ACTIVITIES

Clicking on “Activities” will produce a list of all the activities of the case in context during the time frame selected and concerning the activity type selected from the filter. When a Client and/or Case is “In Context” then only those activities connected to that Client/Case will be displayed. When you click on “Activities” you will be asked to define the search in terms of type and time frame.

The screenshot shows the CARIS software interface. At the top, it displays "CARIS" and the user information "Build4.0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM". Below this is the client record for "Michael Farrington" under "Cymh Outreach (1289) Active". A callout box labeled "Activity Type Filter" points to the "Activity Type" dropdown in the "Activities Search" dialog. The dialog also includes fields for "Keyword" and date selection ("Start Date: 9/13/2005" and "End Date: 9/13/2005") and a calendar for August 2005. At the bottom of the dialog are "Display Activities" and "Cancel" buttons.

When you have selected the appropriate filters, click on “Display Activities” and all the activities which are included in the type and time frame will be displayed.

The screenshot shows the CARIS software interface after the "Display Activities" button was clicked. It displays the "Activities Display" results for the selected filters. The results list various activities, each with a small icon and a timestamp. An arrow points from the "Display Activities" button in the previous screenshot to this list. The results include: Admitted by Ann (2005-08-25 15:34), Medication Intervention, Medication Intervention, Medication Intervention, Case Affiliate Update by Ann (2005-08-22 15:00), Client-Based Consultation by Ann (2005-08-22 14:28), Case Affiliate Update by Ann (2005-08-22 14:23), Case Affiliate Update by Ann (2005-08-22 14:24), Record Correspondence Log Event by Ann (2005-08-22 13:56), Case Member Update by Ann (2005-08-08 15:42:52.17), Client Alert by Ann (2005-08-05 13:38:05.91), and Accepted by Ann (2005-08-04 10:27:44:70). A page number "Page(s): 1" is visible at the bottom right of the results list.

1.7.5 CLOSE

Clicking “Close” under the Case will close the Case but leave the Client still “In Context”. Clicking “Close” under the Client closes both the Case and the Client.

1.8 SEARCHING FOR A CLIENT, CONTACT, MEMBER OR ORGANIZATION

The database contains the names and demographics of every person in CARIS, and any organization that has been entered. In this case, you have access to the entire database, not just your own clients or organizations. However, the information that is available to you when you do access someone else's client, for example, will be limited to basic demographic information so that the client's privacy is protected.

In a typical situation, you may have a walk-in person requesting service and you want to see if they are already in the system. You type in their name and it displays as a client. You can click on "Cases" and see if the person is already involved in a case (Other Client Cases) and who the particular case manager (or member) is so you can refer the person to them or consult with them.

It is important that duplication is avoided so the system is set up so that you MUST search for a name before you can "Create a New Client". Because people use aliases and variations of their names, try to search for as many known names as possible if there is any doubt.

Once a name is entered into the system it cannot be deleted. If a duplication occurs, an administrative decision must be made to deal with it. Usually the information will be consolidated into one of the files and the other one de-populated and left with a note referring you to the complete, active file.

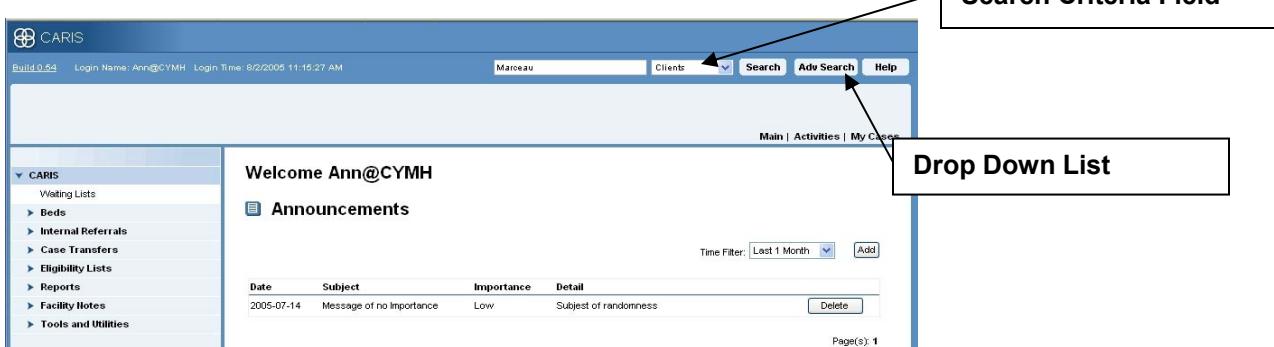
1.8.1 BASIC SEARCH

The basic "Search" function is "inclusive" in that it will produce a list of all persons whose demographics contain all or part of the criteria entered in the field. The field requires as few as two letters to function. The more letters you enter the narrower the search will be.

For example: If you typed in "urk", you would get a list that contained everyone in the database who had "urk" mentioned in their name or demographic info, not just "Burke" or "Gurka", but someone who had a tattoo of a "Turkey".

NOTE: If there are more than 45 people in the database who match the criteria, you will get a prompt that asks you to refine, or narrow, your criteria to reduce the range of possible responses.

Searches can be performed at any time, regardless of who is in Context or what other function you are performing. However, you will leave the "window" you were in and end up with the search results. You will also lose any inputted data from the previous window that has not been saved or entered.



To conduct a search:

Enter a name or part of a name in the Search Criteria field.
From the drop down list, select "Client" "Contact" "Member" or "Organization"
Click on the "Search" button.

A list of all persons in the database whose name(s) or demographics match the search criteria, and who fit the drop down Search category will display.

CARIS ID	Client Name	Birth Date
1000000	Marceau, Jason	1978-07-28
1000027	Marceau, Jean	1985-05-22

NOTE: When you search for a person as a "Client", you can click on View to view the Client Details. The person is now "in Client Context" and you can edit or add to the client's basic and extended demographic information. But, when you search for the same person as a "Contact" and then view the details, only a brief summary of contact information such as name, date of birth and address is presented and the person is not "in Client Context".

1.8.2 ADVANCED SEARCH

The Advanced Search is an “exclusive” search engine. This means that the results of the search will only contain exactly what you typed in any of the fields in the Search window. Consequently, the more fields that are filled in, the more exclusive the resulting search will be. The Advanced Search has the same general fields as the demographics form and enables highly specific searches.

To perform an advanced search:

Type in as much data as you require in as many fields as you wish.
Click on “Search”.

All the clients whose demographic data includes “Michael” will display.

NOTE: The names and data are not case sensitive so you don't have to use capital first initials.

The screenshot shows the CARIS software interface. The top navigation bar includes 'Build 0.57', 'Login Name: Ann@PSDH', 'Login Time: 9/2/2005 2:38:51 PM', and buttons for 'Clients', 'Search', 'Adv Search', and 'Help'. A sidebar on the left lists 'CARIS' categories: Waiting Lists, Beds, Eligibility Lists, Reports, and Facility Notes. The main content area is titled 'Client Search Results' and displays three rows of search results:

CARIS ID	Client Name	Birth Date
1000029	Duncan, Michael	1990-01-31
1000192	Zeus, michael	1987-06-15
1000053	Farrington, Michael	1936-03-10

Below the table are 'View' buttons for each row. At the bottom right are 'Advanced Search' and 'Create Client' buttons.

If you had typed in “Michae” and missed the last “I” like this –

This screenshot shows the 'Advanced Search: Client' page. The search criteria include 'Given Name: Michael'. An arrow points from the misspelling 'Michae' in the 'Given Name' field to the search results page above. The search results are identical to the one shown in the first screenshot.

Then you would receive this result

This screenshot shows the 'Client Search Results' page with the message: 'The search returned no results. You can try advanced search or create a new client.' This occurs because the search term 'Michae' did not match any entries in the database.

(Unless there was an entry somewhere in the database that said “Michae” in which case that entry would display as a result.)

If you had selected “female” from the gender drop down list, then ONLY the female “Michael” would display on the Results list.

The screenshot shows the CARIS software interface. At the top, there is a navigation bar with the CARIS logo, build information (Build 0.57), user login details (Login Name: Ann@PSDH, Login Time: 9/12/2005 2:39:51 PM), and links for Clients, Search, Adv Search, and Help. Below the navigation bar is a main menu with options like Main, Activities, and My Cases. On the left, there is a sidebar titled 'CARIS' with sub-options: Waiting Lists, Beds, Eligibility Lists, Reports, and Facility Notes. The main content area is titled 'Client Search Results' and displays a table with one row. The table columns are 'CARIS ID', 'Client Name', and 'Birth Date'. The data in the table is: CARIS ID 1000192, Client Name Zeus, michael, Birth Date 1987-06-15. There is a 'View' button next to the birth date. Below the table is a 'Client Info' box containing detailed client information: Given Name: michael, Family Name: Zeus, Preferred Name: michael, Gender: female, Aliases: , Age: 18, SII: . To the right of the 'Client Info' box is a 'Page(s): 1' label and two buttons: 'Advanced Search' and 'Create Client'.

NOTE: You cannot perform an advanced search for a Member. An advanced search for a member is unnecessary because a basic search will always produce the required member.

1.9 HELP

The Help function will link you to a pdf version of this Manual.

1.10 SYSTEM ERROR

Occasionally you may receive a “System Error” prompt, usually when you first log into the system. If this occurs, click on the “Refresh” button on your browser toolbar. This will usually work. If it doesn’t, then log off the system and log on again. If this still doesn’t solve the problem, then you may have to shut your computer down and restart.

This typically is a local terminal problem rather than a CARIS problem.

2 Client and Case Management

It is important to remember that the database contains names of “persons”. These persons can be clients, contacts, or members. A person can be any one of those categories, or they can be two of them or all three. It is unlikely, however, that a member will also be a client.

It is important that you search for a person as a client, or contact, because the way you search will affect what you can do with the information afterwards. (see 1.8.1)

2.1 CREATING A NEW CLIENT

To create a new client is basically to enter a new person into the system database. To avoid duplication, the system requires you to perform a search for the person before you create a new one. To Create, or enter, a New Client:

Perform a search as in 1.8.1 or 1.8.2.

If the search produces no results:

Click on “Create Client”

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with 'Build 0.54', 'Login Name: Ann@CYMH', and 'Login Time: 8/4/2005 4:09:44 PM'. Below the bar are buttons for 'Clients', 'Search', 'Adv Search', and 'Help'. The main area has tabs 'Main | Activities | My Cases'. On the left, a sidebar menu under 'CARIS' includes 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', and 'Tools and Utilities'. The central content area is titled 'Client Search Results' and displays a table with columns 'CARIS ID', 'Client Name', and 'Birth Date'. A message in the table states: 'The search returned no results. You can try advanced search or create a new client.' At the bottom right of the search results area, there are buttons for 'Advanced Search' and 'Create Client'. An arrow from the text 'If the search produces no results:' points to this 'Create Client' button.

The “Create Client” form will display.

The screenshot shows the 'Create Client' form. At the top, it has a title 'Create Client'. Below the title is a section titled 'Basic Demographics' with fields for 'Family Name' (with a dropdown arrow), 'Given Name' (text input), 'Middle Initial' (text input), 'Preferred Name' (text input), 'Aliases' (text input), 'Gender' (dropdown menu), and 'Date of Birth' (text input with a date picker). Below this is a section titled 'Extended Demographics' (with a dropdown arrow). At the bottom of the form are buttons for 'Reset', 'Create Client', and 'Cancel'. An arrow from the text 'The “Create Client” form will display.' points to the 'Create Client' button on the form.

Fill in the fields

Click on the + sign to open the “extended demographics” box.

Fill in as many fields as you can.

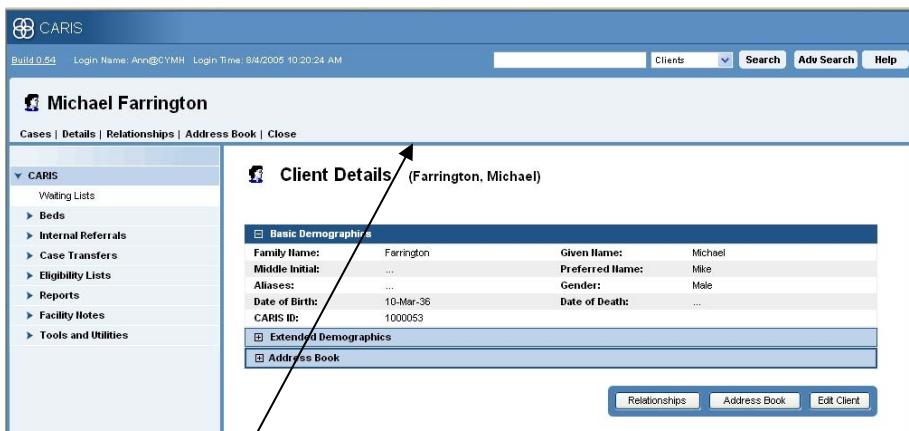
Click “Create Client”

A dialogue box will display asking you if you want to create this client.



Click “OK”

The Client Details box will display containing the information you have entered.



You have now added a new client to the system database. If you now exit from this window (by clicking “close”) the new client will be saved. However, if you open “My Cases” later, the client will not appear because you have not yet opened a case for this client. Unless you just wanted to record details regarding this client, normally you would proceed to “Create a New Case” for this client. (Section 2.16)

Note that anyone who has CARIS access in your organization will now have access to the demographic information you have entered if they perform a search for that client.

2.2 FINDING AN EXISTING CLIENT

To find a client who is already in the system:

Type in all or part of the client’s name in the “Search Criteria” field.

Click “Search”

A list of all clients with “Marceau” as part of their demographics will display.

Click “View”

The Client Details window will display.

Confirm the client’s identity by clicking the “Extended Demographics” + sign

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with links for 'Build 0.54', 'Login Name: Ann@CYMH', 'Login Time: 8/2/2005 11:15:27 AM', and search functions ('Clients', 'Search', 'Adv Search', 'Help'). The main title is 'Jason Marceau'. Below the title, there are links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A sidebar on the left is titled 'CARIS' and contains links for 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Forms', 'Tools and Utilities'. The main content area is titled 'Client Details (Marceau, Jason)'. It has sections for 'Basic Demographics' and 'Extended Demographics'. Under 'Basic Demographics', fields include Status in Canada (Canadian Citizen), Employment Status (Part Time), Ethno-cultural Background (Canadian), Education Level (Grade 2), Preferred Language (Armenian), Education Type (Home School), Lang Spoken at Home (Assitic Language), Primary Living Arrangement (Group Home), Religious Practice (Christian Not Included Elsewhere), Household Composition (Group Setting), Aboriginal Origin (Non-aboriginal), Dental Plan (...), Band Status No. (...), PEI (...), Guardianship Status (Cots - Temporary Custody), PHN (6546549641), Disability (...), SII Number (...), and Identifying Marks (...). There's also a 'Address Book' section with a table showing locations like '123 - 23423 Some Street, Victoria, BC, V8X4H4, CA' and '123 Street Name, Victoria, BC, V0V0V0, CA' with details like 'Primary', 'Start Date', 'End Date', and 'Notes'. At the bottom right of the main content area are buttons for 'Relationships', 'Address Book', and 'Edit Client'. A page number 'Page(s): 1' is also visible.

Check the demographics.

2.3 EDITING AN EXISTING CLIENT

Editing client demographics may be a function that you have not been authorized to perform. If this is the case, the “Edit Client” button will be grayed out and you will be unable to perform this operation.

To edit the file of an existing client, once you have found the client and confirmed the identity,

Click the “Edit Client” button.

The screenshot shows the 'Edit Client' screen for Michael Farrington. At the top, there's a navigation bar with links for 'Build 0.54', 'Login Name: Ann@CYMH', 'Login Time: 8/4/2005 10:20:24 AM', and search functions ('Clients', 'Search', 'Adv Search', 'Help'). The main title is 'Michael Farrington' and the subtitle is 'Cymh Outreach (1289) Pre-Admit'. Below the title, there are links for 'Summary', 'Members', 'Affiliates', 'Case Plan', 'Activities', and 'Close'. A sidebar on the left is titled 'CARIS' and contains links for 'Waiting Lists', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Case Forms', 'Tools and Utilities'. The main content area is titled 'Edit Client (Farrington, Michael)'. It has sections for 'Basic Demographics' and 'Extended Demographics'. Under 'Basic Demographics', fields include Status in Canada (dropdown), Employment Status (dropdown), Ethno-cultural Background (dropdown), Education Level (dropdown), Preferred Language (dropdown), Education Type (dropdown), Lang Spoken at Home (dropdown), Primary Living Arrangement (dropdown), Household Composition (dropdown), Aboriginal Origin (dropdown), Dental Plan (dropdown), Band Status No. (dropdown), PEI (dropdown), Guardianship Status (dropdown), PHN (dropdown), Disability (dropdown), SII Number (dropdown), and Identifying Marks (dropdown). At the bottom right of the main content area are buttons for 'Reset', 'Save Changes', and 'Cancel'.

The “Edit Client” window will display and you can proceed to complete more fields or change existing information.

If you change your mind, click the “Reset” button and your changes will be erased and the original entries restored. Clicking “Cancel” will return you to “Client Details”

- 4) Click “Save Changes” to retain your editing, and the new demographic information will be saved.

2.4 CREATING A NEW CONTACT

To create a new Contact is to enter a new person into the system database. A Contact is typically a person who is in some way connected to an existing or new Client or Case, but who does not have access to the file. A Contact can also be a person connected with the work that you, or your co-workers, perform such as a physician, minister, police officer, government worker and so on. To avoid duplication, the system requires you to perform a search for the person before you create a new one. To Create, or enter, a New Contact:

Perform a search as in 1.8.1 or 1.8.2, but use the drop down list to select “Contact”.

If the search produces no results:

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 10:00:37 AM

zfd Contacts Search Adv Search Help

Main | Activities | My Cases

Contact Search Results

CARIS ID	Contact Name	Birth Date
The search returned no results. You can try advanced search or create a new contact.		

Page(s): 1

Advanced Search Create Contact

Click on “Create Contact”

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 10:00:37 AM

zfd Contacts Search Adv Search Help

Main | Activities | My Cases

Create Contact

Family Name:	Scrooge	Given Name:	Ebenezer
Preferred Name:	Eb	Aliases:	
Date of Birth:	December 25, 1925	Gender:	Male
Date of Death:			

Reset Create Contact Cancel

The “Create Contact” form will display.

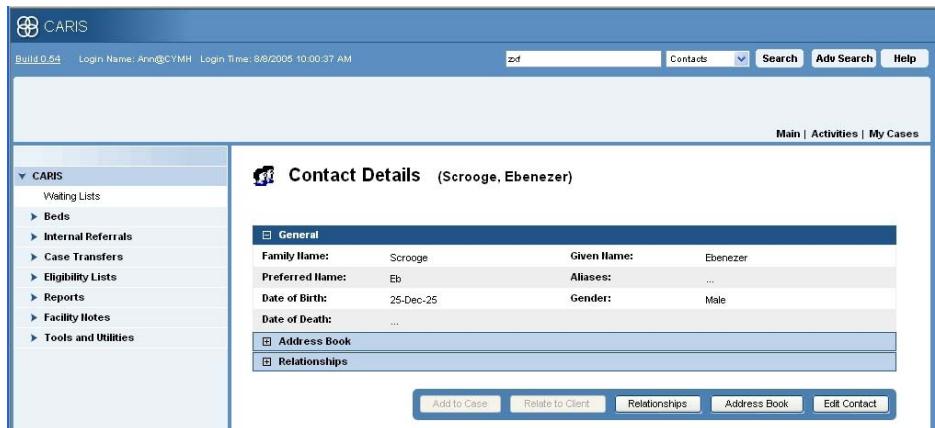
**Fill in as many fields as you can.
Click “Create Contact”**

A dialogue box will display asking you if you want to create this contact.



Click “OK”

The Contact Details box will display containing the information you have entered.



You have now added a new contact to the system database.

2.5 FINDING AN EXISTING CONTACT

To find a contact who is already in the system:

Type in all or part of the contact’s name in the “Search Criteria” field.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:26:38 AM

Scr Contacts Search Adv Search Help

Main | Activities | My Cases

Welcome Ann@CYMH

Announcements

Date Subject Importance Detail

2005-07-14 Message of no importance Low Subject of randomness Delete

Time Filter: Last 1 Month Add

Page(s): 1

Navigation menu (left):

- CARIS
 - Waiting Lists
 - Beds**
 - Administration
 - Management
 - Reservations
 - Occupancy
 - Internal Referrals
 - Case Transfers
 - Eligibility Lists
 - Reports
 - Facility Notes
 - Tools and Utilities

Click "Search"

A list of all contacts with "Scr" as part of their demographics will display.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:26:38 AM

Scr Contacts Search Adv Search Help

Main | Activities | My Cases

Contact Search Results

CARIS ID	Contact Name	Birth Date
PSCRO-83	Scrooge, Ebenezer	1925-12-25

Page(s): 1

Advanced Search Create Contact

Navigation menu (left):

- CARIS
 - Waiting Lists
 - Beds**
 - Administration
 - Management
 - Reservations
 - Occupancy
 - Internal Referrals
 - Case Transfers
 - Eligibility Lists

Click "View"

The "Contact Details" window will display.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:26:38 AM

Scr Contacts Search Adv Search Help

Main | Activities | My Cases

Contact Details (Scrooge, Ebenezer)

General			
Family Name:	Scrooge	Given Name:	Ebenezer
Preferred Name:	Eb	Aliases:	...
Date of Birth:	25-Dec-25	Gender:	Male
Date of Death:	...		
<input type="checkbox"/> Address Book <input type="checkbox"/> Relationships			

Add to Case Relate to Client Relationships Address Book Edit Contact

Navigation menu (left):

- CARIS
 - Waiting Lists
 - Beds**
 - Administration
 - Management
 - Reservations
 - Occupancy
 - Internal Referrals
 - Case Transfers
 - Eligibility Lists
 - Reports
 - Facility Notes
 - Tools and Utilities

NOTE: You will notice that there are no "Extended Demographics" shown when "Scrooge" is accessed as a "Contact". This is a privacy function. If you had accessed "Scrooge" as a "Client", the "Extended Demographics" would be viewable and therefore changeable. At that point, Scrooge as a "Contact" becomes "Scrooge" as a "Client" and a Case may be created for him. If you don't create a Case, he stays in the database as a "Contact". You can access anyone in the database as

either a “Client” or a “Contact” It depends on what you want to do with the person afterwards that determines how you will access them.

CONTACTS, CLIENTS AND MEMBERS

To clarify these three “person” descriptions:

A Client is a person who is the primary person in a Case and who is receiving service.

A Contact is a person who is connected to a Case but who cannot view the Case or is just a person of interest to the Agency or the Case Worker(s).

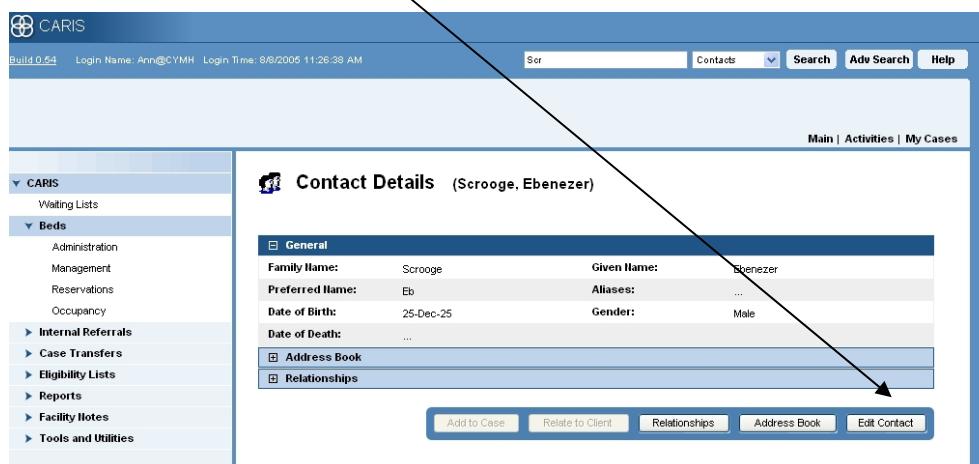
A Member is a person who is connected to a specific Case and who has access to the CARIS Case File of that Client.

2.6 EDITING AN EXISTING CONTACT

Editing contact demographics may be a function that you have not been authorized to perform. If this is the case, the “Edit Contact” button will be *grayed out* and you will be unable to perform this operation.

To edit the file of an existing contact, once you have found the contact and confirmed the identity,

Click the “Edit Contact” button.



The “Edit Contact” window will display and you can proceed to complete more fields or change existing information.

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with links for 'Build 0.54', 'Login Name: Ann@CYMH', 'Login Time: 8/8/2005 11:34:33 AM', and search functions ('Search', 'Adv Search', 'Help'). Below the navigation bar, the title 'Ebenezer Scrooge' is displayed, along with links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A left sidebar menu under 'CARIS' includes 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', and 'Tools and Utilities'. The main content area is titled 'Edit Contact (Scrooge, Ebenezer)'. It contains fields for 'Family Name' (Scrooge), 'Given Name' (Ebenezer), 'Preferred Name' (Eb), 'Aliases' (empty), 'Date of Birth' (December 25, 1925), 'Gender' (Male), and 'Date of Death' (empty). At the bottom of this form are 'Reset', 'Save Changes', and 'Cancel' buttons.

If you change your mind, click the “Reset” button and your changes will be erased and the original entries restored. Clicking “Cancel” will return you to “Contact Details”

Click “Save Changes” to retain your editing, and the new demographic information will be saved.

(See Note above in Section 2.5 re: “Extended Demographics”)

2.7 FINDING A MEMBER

To find a member who is already in the system:

Type in all or part of the member’s name in the “Search Criteria” field.
Select “Members” from the drop down list

The screenshot shows the CARIS software interface. At the top, there's a navigation bar with links for 'Build 0.54', 'Login Name: Ann@CYMH', 'Login Time: 8/8/2005 11:34:33 AM', and search functions ('Search', 'Adv Search', 'Help'). Below the navigation bar, the title 'Michael Farrington' is displayed, along with links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A left sidebar menu under 'CARIS' includes 'Waiting Lists', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Case Forms', and 'Tools and Utilities'. The main content area is titled 'Case Summary' for 'Cymh Outreach (1289) Pre-Admit'. It displays a table of case details: Case Type (Cymh Outreach), Referral Date (Aug-04-2005); Case Status (Pre-Admit), Accept/Reject Date (Aug-04-2005); Case Id (1289), Admission Date (...); Case Manager (One, Ann_3), Est. Discharge Date (...); Referral Source (Self), Discharge Date (...); Referral Mode (Walk-in), Case Close Date (...); Bed Information (...); and Waitlist Information (...). At the bottom of this summary are buttons for 'Reject Referral', 'Accept Referral', 'Cancel Case', 'Admit', 'Discharge', and 'Close Case'. Two arrows point from the text above to the 'Search' button and the 'Members' dropdown in the top navigation bar.

Click “Search”

A list of all members with “Ma” as part of their demographics will display.

Member Name	Organization	
Anthony, Marc	DFSP	View
Clinician, Marion	PA	View
Marceau, Jason	DFSP	View
Macdonald, Andy	MAC	View
One, Ann	mac	View
Hustwick, Barb	MAC	View

Click “View” beside the member whose details you want to see.

The “Member Details” window will display.

First Name:	Marion	Last Name:	Clinician
Phone (H):	...	Organization:	PA
Phone (W):	...	Fax:	...
Phone (M):	...	Email:	...
Phone (E):	...		

You will notice that only basic information is provided. This is for privacy and security reasons. You can neither edit nor create a member, all you may do is assign an existing member to your case. (See Section 2.21). Creating and editing are administrative functions.

2.8 CREATING A NEW ORGANIZATION

To create a new organization is to add an organization to the database. Organizations are either external such as the YW/YMCA, Jubilee Hospital, or another government department or agency, or they could be an internal department or agency such as “Child Care” or “Special Needs”. The listing will provide descriptive and contact information for the organization. To avoid duplication, the system requires you to perform a search for the organization before you create a new one. To Create, or enter, a New Organization:

Perform a search as in 1.8.1 or 1.8.2.

NOTE: You may want to search using a variety of input criteria since people often refer to organizations in different ways. For example, “The Y” or “YMCA” and do not use its full name. So if someone has entered the Young Women’s and Men’s Christian Association in the database as the organization name, typing YMCA into the search criteria field would not register a “hit” and thus will not bring up the organization.

If the search produces no results:

Click on “Create Organization”

CARIS

Build 0.64 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YMCA Organizations Search Adv Search Help

Main | Activities | My Cases

Organization Search Results

Organization Name	Organization Type
The search returned no results. You can try advanced search or create a new organization.	

Page(s): 1

Advanced Search Create Organization

The “Create Organization” form will display.

CARIS

Build 0.64 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YMCA Organizations Search Adv Search Help

Main | Activities | My Cases

Create Organization

Organization Name:	Young Men's and Young Women's Christian Association
Organization Acronym:	YM-YWCA
Description:	Physical Training, sports and self-development facilities

Organization Type: Youth and Family

Create Organization Cancel

Fill in as many fields as you can.

Click “Create Organization”

A dialogue box will display asking you if you want to create this organization.



Click “OK”

The Organization Details box will display containing the information you have entered.

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YMCA Organizations Search Adv Search Help

Main | Activities | My Cases

Organization Details (Young Men's and YoungWomen's Christian Association)

General

Organization Name:	Young Men's and YoungWomen's Christian Association		
Organization Acronym:	YM-YWCA	Organization Type:	Youth and Family
Description:	Physical Training, sports and self-development facilities		

Address Book

Address book management Create Contract Edit Organization Transfer Create Internal Referral

You have now added a new organization to the system database.

2.9 FINDING AN EXISTING ORGANIZATION

To find an organization that is already in the system:

Type in all or part of the organization's name in the "Search Criteria" field.
Select "Organizations" from the drop down list

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YM-YWCA Organizations Search Adv Search Help

Main | Activities | My Cases

Welcome Ann@CYMH

Announcements

Date Subject Importance Detail Time Filter: Last 1 Month Add

Date	Subject	Importance	Detail
2005-07-14	Message of no Importance	Low	Subject of randomness

Delete Page(s): 1

Click "Search"

A list of all organizations with "YW-YMCA" as part of their demographics will display.

NOTE: You have to be careful when typing in the criteria. In this case, had you typed in just "YMCA" you would have received a "No Results" notice. This is because, even though many people refer to the "Y" as the "YMCA", in fact the acronym was entered as the "YM-YWCA" and as such, no part of either the full name or the acronym contains the sequence "YMCA". So, if you don't get a result, it's a good idea to try some different combinations before you proceed to create a new organization.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YMCA Organizations Search Adv Search Help

Main | Activities | My Cases

Organization Search Results

Organization Name	Organization Type
The search returned no results. You can try advanced search or create a new organization.	

Page(s): 1

Advanced Search Create Organization

The left sidebar shows a navigation menu under the 'CARIS' heading:

- Waiting Lists
- Beds
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Tools and Utilities** (selected)
- Templates

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YM-YWCA Organizations Search Adv Search Help

Main | Activities | My Cases

Organization Search Results

Organization Name	Organization Type
Young Men's and Young Women's Christian Association	YF

Page(s): 1

Advanced Search Create Organization

Click "View"

The Organization Details window will display.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/8/2005 11:34:33 AM YMCA Organizations Search Adv Search Help

Main | Activities | My Cases

Organization Details (Young Men's and Young Women's Christian Association)

General

Organization Name:	Young Men's and Young Women's Christian Association
Organization Acronym:	YM-YWCA
Organization Type:	Youth and Family
Description:	Physical Training, sports and self-development facilities

Address Book

Address book management Create Contract Edit Organization Transfer Create Internal Referral

2.10 EDITING AN EXISTING ORGANIZATION

Editing existing organization details may be a function that you have not been authorized to perform. If this is the case, the “Edit Organization” button will be grayed out and you will be unable to perform this operation.

To edit the file of an existing organization, once you have found the organization and confirmed its identity,

Click the “Edit Organization” button.

The screenshot shows the CARIS software interface. At the top, there is a blue header bar with the CARIS logo, build information (Build 0.54), login details (Login Name: Ann@CYMH, Login Time: 8/8/2005 11:34:33 AM), and navigation links (YMCA, Organizations, Search, Adv Search, Help). Below the header is a search bar with 'YMCA' typed in. The main content area has a title 'Organization Details (Young Men's and YoungWomen's Christian Association)'. Under this title, there are two sections: 'General' and 'Address Book'. The 'General' section contains fields for Organization Name (Young Men's and YoungWomen's Christian Association), Organization Acronym (YM-YWCA), and Organization Type (Youth and Family). The 'Address Book' section is collapsed. At the bottom of this window are buttons for 'Address book management', 'Create Contract', 'Edit Organization', 'Transfer', and 'Create Internal Referral'. A black arrow points from the text 'Click the “Edit Organization” button.' to the 'Edit Organization' button in the bottom right corner of the window.

The “Edit Organization” window will display and you can proceed to complete more fields or change existing information.

The screenshot shows the 'Edit Organization' window for YMCA. The title is 'Edit Organization (Young Men's and YoungWomen's Christian Association)'. It contains three input fields: 'Organization Name' (Young Men's and YoungWomen's Christian Association), 'Organization Acronym' (YM-YWCA), and 'Organization Type' (Youth and Family). Below these is a 'Description' field containing 'Physical Training, sports and self-development facilities'. At the bottom right are 'Save Changes' and 'Cancel' buttons. A black arrow points from the text 'If you change your mind, click the “Cancel” button and you will return to “Organization Details”' to the 'Cancel' button.

If you change your mind, click the “Cancel” button and you will return to “Organization Details”

Click “Save Changes” to retain your editing, and the new demographic information will be saved.

2.11 CREATING A NEW RELATIONSHIP

A Relationship describes a connection between a client and a person who is familiarly or socially related. The relationship is for reference purposes since the person has no access to the case.

To Create a Relationship,

Bring the client into context.

Click on “Relationships”

The screenshot shows the CARIS software interface. The main title bar says "CARIS". Below it, "Build 0.57" and "Login Name: Ann@PSDH" are displayed. The search bar contains "ma". The menu bar includes "Members", "Search", "Adv Search", and "Help". The left sidebar has a "CARIS" section with "Waiting Lists", "Beds", "Eligibility Lists", "Reports", "Facility Notes", and "Alerts". The main content area is titled "Relationships (Marceau, Jason)". It shows a table with one row: Person "Dean, Steve", Type "Family", Relation "Cousin", Start Date "2005-07-12", End Date "", and IIs "" (with an "Edit" button). At the bottom right of the table is a "Page(s): 1" link and a blue "New Relation" button. An arrow points from the text "Click on ‘Relationships’" to the "Relationships" link in the sidebar. Another arrow points from the text "If the person is not already on the list, Click ‘New Relation’" to the "New Relation" button.

If the person is not already on the list,

Click “New Relation”

A Search window will display.

The screenshot shows the same CARIS interface as the previous one, but with a "Person Search" dialog box overlaid on the "Relationships" table. The dialog has a "Search Criteria" field containing "Michael". It also has "Search", "Cancel", and "Relation" buttons. An arrow points from the text "Enter the person’s name Click ‘Search’" to the "Search Criteria" field.

Enter the person’s name

Click “Search”

Relationships (Marceau, Jason)

Person	Type	Relation	Start Date	End Date	Its
Dean, Steve	Email	Cousin	2005-07-12		<input type="checkbox"/>

Search Criteria: Michael

Name Birth Date

Duncan, Michael 1990-01-31 Relate

Farrington, Michael 1936-03-10 Relate

Page(s): 1

Create Contact

Select the appropriate person from the search results.
Click "Relate"

The Relationship data window will display.

Relationships (Marceau, Jason)

Person	Type	Relation	Start Date	End Date	Its
Dean, Steve	Email	Cousin	2005-07-12		<input type="checkbox"/>

Relationship Type: Social

T'Farrington, Michael' is Friend of "Marceau, Jason"

Start Date: 8/26/2005

End Date:

Notes:

Save Relationship Cancel

Fill in the appropriate fields
Click "Save Relationship"

The Relationship window will now include the new relationship.

Relationships (Marceau, Jason)

Person	Type	Relation	Start Date	End Date	Its
Dean, Steve	Family	Cousin	2005-07-12		<input type="checkbox"/>
Farrington, Michael	Social	Friend	2005-08-26		<input type="checkbox"/>

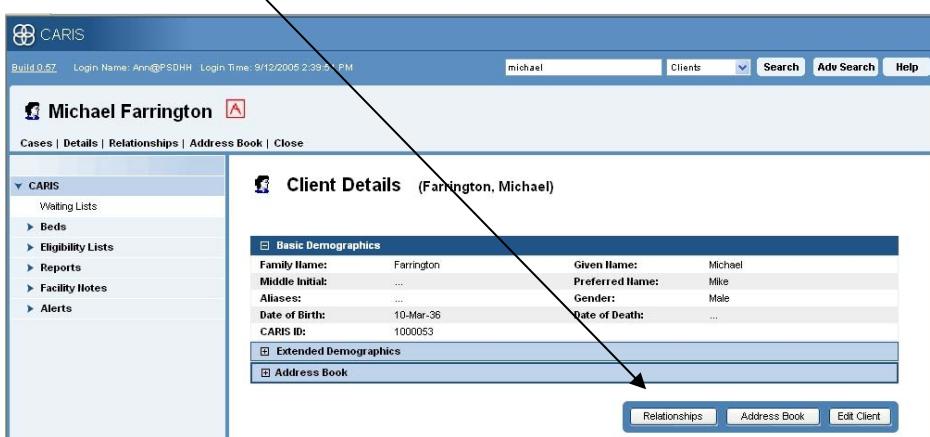
Page(s): 1

New Relation

2.12 FINDING AN EXISTING RELATIONSHIP

To find details about an existing relationship, with the client “In Context”, on the Client Details window:

Click on “Relationships”



A list of all recorded relationships to the client will display.



2.13 EDITING AN EXISTING RELATIONSHIP

To edit any of the listed relationships, or to view details, from the Relationship list (see 2.12):

Click on “Edit”

**Enter the changes you wish to make, change the dates or add a note.
Click on “Save Relationship”**

You will see that the only things you can change are the end date and the notes. Once a relationship has been saved, it cannot be changed as far as the type or the relationship is concerned. If you wish to change either of these items:

Click on “Edit”

Enter today's date as the “End Date”

Add a note about why you are doing this.

Save Relationship

You will not be able to add a new relationship using the same name until tomorrow when the previous one will have been ended.

2.14 CREATING AN AFFILIATE

An affiliate is a person who has a direct or indirect interest in a particular case.

A Relation is related to the person; an Affiliate is related to the case. An Affiliate is typically a relative, a physician, a case worker from another agency or a police officer for example.

To add an affiliate to a client's case file, the client and case must be in context.

Click on “Participants”

The list of participants, including affiliates, attached to the client/case will display.

Name	Case Access	Start Date	End Date	
One, Ann_3	Case Manager	2005-08-04		Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	Remove

Name	Role	Start Date	End Date	
Reginald, David	General	2005-08-22		Remove
Dean, Steve	General	2005-08-22		Remove

To add a new affiliate to the list,

Perform a “Contact” search (Section 1.8.1) and if the contact is in the system, they will display.

CARIS ID	Contact Name	Birth Date	
PTER-100000038	Theresa, Elizabeth	1902-04-12	View

If the person is NOT in the system, try their name spelled differently or perform an advanced search (Section 1.8.2). If they still don't show up, Create a New Contact as in Section 2.4.

Click “View”

Family Name:	Theresa	Given Name:	Elizabeth
Preferred Name:	Mother	Aliases:	...
Date of Birth:	12-Apr-02	Gender:	Female
Date of Death:	...		

Click “Add to Case”

The “Add Case Affiliate” window will display.

This screenshot shows the 'Add Case Affiliate' dialog box. It includes fields for Start Date (3/24/2006), End Date, Client Name (Michael Farrington), Case Id (38414), Member Name (Haugen, Jason Lee), and Role (a dropdown menu showing options like Alternate Care Giver, Emergency Contact, Legal Guardian, No Contact, Other, Primary Care Giver, and Secondary Care Giver). A 'Save' button is visible at the bottom right.

Select the appropriate Start and End dates

Select a role from the drop down list

Click “Add Affiliate”

This screenshot shows the 'Participants List' window. It displays two sections: 'Members' and 'Affiliates'. The 'Affiliates' section contains a table with columns for Name, Role, Start Date, and End Date. An arrow points to the 'Name' column of the first affiliate entry, which is Haugen, Jason Lee. The table shows the following data:

Name	Role	Start Date	End Date
Reginald, David	General	2005-08-22	
Dean, Steve	General	2005-08-22	
Theresa, Elizabeth	General	2005-08-22	2005-10-07
Haugen, Jason Lee	Legal Guardian		2006-03-24

The new affiliate will display in the “Affiliates” list.

2.15 REMOVING AN AFFILIATE OR A MEMBER

To remove an affiliate or a member from the Case list,

With the Client/Case in context,

Click on Participants

Click on “Remove” beside the person’s name.

A prompt will display asking if you really want to remove that person.

Cymh Outreach (1289) Pre-Admit

Participants List

Name	Case Access	Start Date	End Date
One, Ann_3	Case Manager	2005-08-04	
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30

Name	General	2005-08-22	2005-10-07
Reginald, David			
Dean, Steve			
Theresa, Elizabeth			

Click “OK”

The person will be removed from the list.

2.16 CREATING A NEW CASE (REFERRAL)

A client who has been entered into the system is considered a “person” until a Case has been created for him or her, at which time the person becomes a “client”.

To create a new case:

Bring the “person” into context (Section 2.2)

Client Details (Farrington, Michael)

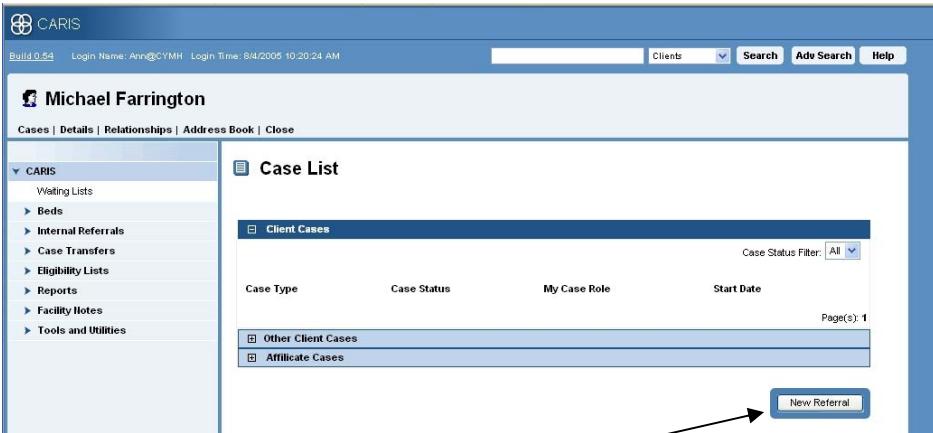
Basic Demographics

Family Name:	Farrington	Given Name:	Michael
Middle Initial:	...	Preferred Name:	Mike
Aliases:	...	Gender:	Male
Date of Birth:	10-Mar-36	Date of Death:	...
CARIS ID:	1000053		

Extended Demographics

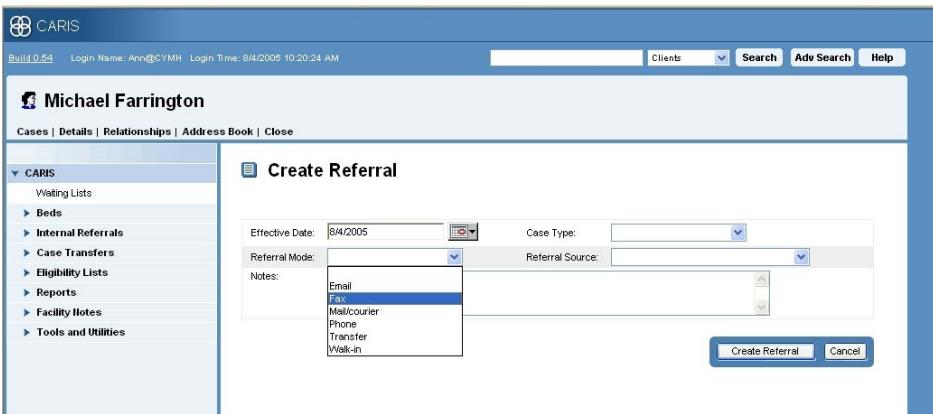
Address Book

Click on “Cases”



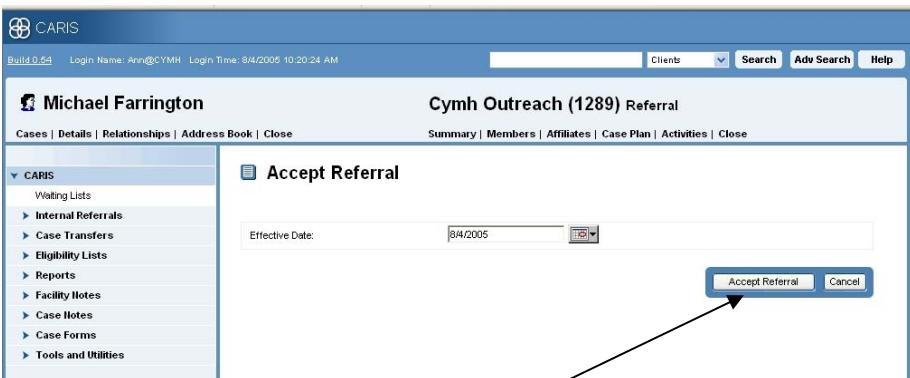
A list of existing cases will display. In this case there are none.

Click on “New Referral” to start the process of creating a case.



The window that appears contains a series of fields. The effective date (which defaults to today's date) must be entered, and a selection from each of the drop down lists must be selected. The notes field is optional. When you have selected the options,

Click “Create Referral”



The “Accept Referral” window will display. Check the “Case Information” in the Case context area to make sure it is correct, then,

Click “Accept Referral”

(If you wish to make a change, click “Cancel” and you will be returned to the “Create Case” window.)

The screenshot shows the CARIS software interface. The top navigation bar includes 'Build 0.54', 'Login Name: Ann@CYMH', 'Login Time: 8/4/2005 10:20:24 AM', and buttons for 'Clients', 'Search', 'Adv Search', and 'Help'. Below the navigation is a header for 'Michael Farrington' and 'Cymh Outreach (1289) Pre-Admit' with links for 'Summary', 'Members', 'Affiliates', 'Case Plan', and 'Activities'. A left sidebar under 'CARIS' lists 'Waiting Lists', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Case Forms', and 'Tools and Utilities'. The main content area is titled 'Case Summary' and contains a table of client information. At the bottom of the summary section are several buttons: 'Reject Referral', 'Accept Referral', 'Cancel Case', 'Admit', 'Discharge', and 'Close Case'. Arrows labeled 6 and 7 point to the 'Close Case' and 'Cancel Case' buttons respectively.

The client is now in the pre-admit stage. You may leave the client there until you are ready to admit him or her at a future date, or admit (6) the client now.

NOTE: You may have found during the creation of this new case that the client is not suitable for the Case or Program that you were considering. If you decide not to continue with the case, you may “Cancel” (7) the case.

2.17 DISCHARGING A CLIENT

When you discharge a client, you effectively cease to work with the client on this case, but the case remains open and will appear on the client's Case List, until you “Close the Case” (Section 2.18). This feature allows occasional client contact (eg. Consultations, phone calls) to be recorded on the client file when the client is no longer receiving regular services.

To discharge a client,

Place the client into context.

Open “Cases”

Select “View” for the case you wish to discharge him from.

The screenshot shows the CARIS software interface. The top navigation bar includes 'Build 0.57', 'Login Name: training1@PSDHH', 'Login Time: 8/26/2005 11:59:30 AM', and buttons for 'Clients', 'Search', 'Adv Search', and 'Help'. Below the navigation is a header for 'Michael Farrington' with a link 'A'. A left sidebar under 'CARIS' lists 'Beds', 'Eligibility Lists', 'Reports', 'Facility Notes', and 'Alerts'. The main content area is titled 'Case List' and contains a table titled 'Client Cases'. The table has columns for 'Case Type', 'Case Status', 'My Case Role', and 'Start Date'. Each row has a 'View' button. At the bottom of the table are links for 'Other Client Cases' and 'Affiliate Cases'. The text 'Page(s): 1' is displayed at the bottom right of the table.

The Case Summary will display.

 CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) VHRP (74880) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Active	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge Close Case



Click on “Discharge”

The Discharge Form will display.

 CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) VHRP (74880) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Discharge Form

Date:	10/31/2005
Reason:	<input type="button" value="Add"/> Program Completed
Responsible Agent:	Self
Discharge Note:	
Summary of Services Received:	personal guidance and consultation
Post-Service Recommendations:	follow-up calls monthly

Save Cancel

Fill in the appropriate fields with the information required to validate the discharge.

Click “Save”

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857)

Cases | Details | Relationships | Address Book | Close

VHRP (74880) Follow-up

Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Follow-up	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge **Close Case**

The Case Summary now shows the discharge date.

2.18 CLOSING A CASE

Closing a Case means that you will no longer have any dealings with the client in relation to this particular case, nor will any affiliates or members. The Case will be closed and will no longer appear on the client's "Case List". You will be able to resurrect the case for reference purposes by selecting the "Closed Cases" filter in the client's "Case List".

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857)

Cases | Details | Relationships | Address Book | Close

VHRP (74880) Follow-up

Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Follow-up	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge **Close Case**

Click on "Close Case"

The "Close Case" window will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857)

VHRP (74880) Follow-up

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Close Case

Effective Date: 10/31/2005

Reason for Closure: Completed

Close Case Cancel

CARIS

- Waiting Lists
- Beds**
- Eligibility Lists
- Reports
- Organization Notes
- Case Notes
- Alerts
- Case Forms

Select the effective date for closing the case

Select a reason from the drop down list

Click "Close Case"

The Case Summary will display with the date and reason shown and no other options available. The Case is closed.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857)

VHRP (74880) Closed

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Closed	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	Oct-31-2005
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge Close Case

CARIS

- Waiting Lists
- Beds**
- Eligibility Lists
- Reports
- Organization Notes
- Case Notes
- Alerts
- Case Forms

2.19 FINDING AN EXISTING CASE

Cases are always attached to a specific client. To find a case, you must know the client's name, or be able to locate the client through the various search methods (Section 1.8)

Once the client is "In Context",

Click on "Cases"

The client's Case List will display and you can then view the case details. When you click "View", the case comes into context also.

2.20 ADMITTING A CLIENT

You can create a case for a client and continue to prepare the paperwork, or investigate the client's suitability for a program, wait until a clinician has time to see the client, or just wait for the client to decide to work with you. This is the "Pre-admit" phase, where you are both getting ready to make a commitment to proceed. Once you "Admit" a client, you are now in the active phase of a client/case worker context with all the implications of that status.

To admit a client to a case,

Select the appropriate case from the client's case list and open it by clicking on "View"

Click "Admit"

The effective date will be today, and you can select the estimated discharge date, or leave it blank.

Select the appropriate dates
Click "Admit"

2.21 ADDING A MEMBER TO A CASE

A Member is a person who has access to the case files and who is actively involved in the case. You can appoint a member to one of your cases from the list of members only if you are the Case Manager. The person who creates the Case (usually the Intake Clinician) is automatically assigned the role of Case Manager. He or she will be able to assign the role to the appropriate clinician when one is determined.

To add a member to your case,

Bring the client and case into context
Perform a Search for the member you wish to add to the case.

Member Name	Organization	
Anthony, Marc	DFSP	<input type="button" value="View"/>
Clinician, Marion	PA	<input type="button" value="View"/>
Huber, Anna-Maria	CYMH	<input type="button" value="View"/>
Hustwick, Barb	MAC	<input type="button" value="View"/>
Marceau, Jason	DFSP	<input type="button" value="View"/>
Macdonald, Andy	MAC	<input type="button" value="View"/>
One, Ann	mac	<input type="button" value="View"/>

Select the member you want from the list and click "View"

CARIS

Build 0.57 Login Name: Ann@PSDHH Login Time: 8/26/2005 4:15:45 PM ma Members Search Adv Search Help

Jason Marceau Victory Hill Residential Program (8092) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Member Details (Andy Macdonald)

First Name:	Andy	Last Name:	Macdonald
Phone (H):	...	Organization:	MAC
Phone (W):	...	Fax:	...
Phone (M):	...	Email:	...
Phone (E):	...		

Add to Case

If you are sure this is the right member,

Click on "Add to Case"
Choose the appropriate "Role" from the drop down list.

CARIS

Build 0.57 Login Name: Ann@PSDHH Login Time: 8/26/2005 4:15:45 PM ma Members Search Adv Search Help

Jason Marceau Victory Hill Residential Program (8092) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Assign Case Member

Start Date:	8/26/2005	End Date:	
Client Name:	Marceau, Jason	Case Id:	8092
Member Name:	Andy Macdonald	Role:	Case Worker

Assign Case Member Cancel

Both the Start and End dates can be determined by using the pull down calendars. The start date will default to today's date. The member's role must be selected.

Click on "Assign Case Member".

The member will now be included in the Participants List as a "Case Worker" (in this example)

CARIS

Build 0.57 Login Name: Ann@PSDHH Login Time: 8/26/2005 4:15:45 PM ma Members Search Adv Search Help

Jason Marceau Victory Hill Residential Program (8092) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Participants List

Members			
Name	Case Access	Start Date	End Date
One, Ann_2	Case Manager	2005-08-22	
Macdonald, Andy	Case Worker	2005-08-26	

Remove Remove

Page(s): 1

Affiliates			
Name	Role	Start Date	End Date

Page(s): 1

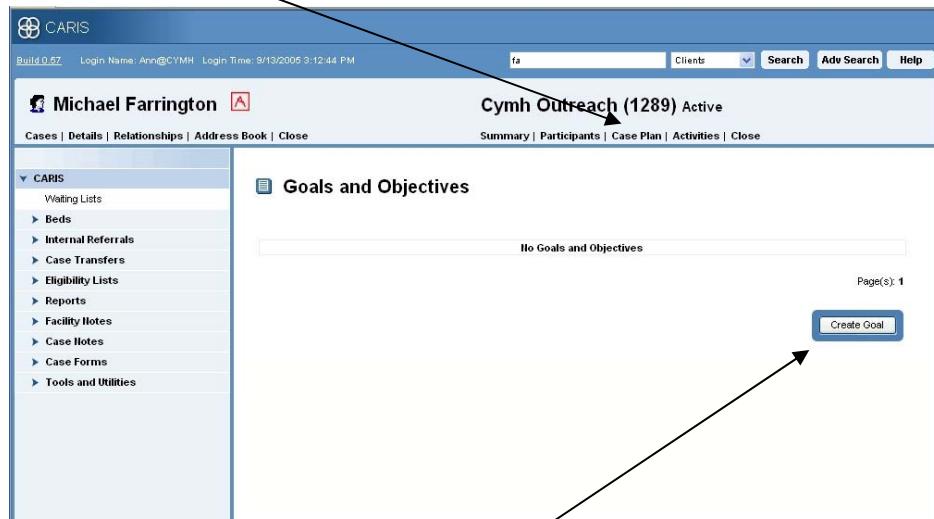
2.22 DEVELOPING A CASE PLAN

The term “Case Plan” as used in this system refers to the “Goals and Objectives” set by the Case Manager (and probably Case Members) and the Client for the particular “Case” that is “In Context”.

2.22.1 CREATING A GOAL

The “Goal” is the broad conclusion to the Case that the Plan is aimed at achieving. To Create the Goal, bring the Client and the Case into “Context”.

Click on “Case Plan”



Any existing Goals will be displayed. In this case there are none because this is a new case and none have been set.

Click “Create Goal”

Select a goal from the drop down list, or select “User Defined Goal” and type in a goal in the text box..

Click “Save” and the Goal will be saved and will also become “Active”.

Note that until it is saved, the “Status” is grayed out.

The Goal will now be displayed in the Case Plan “Goals and Objectives” window.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

fa Clients Search Adv Search Help

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Help him find a job

Goal Details:

Priority:	PRIORITY_1	Status:	Active
Critical Date:	2005-09-12	Start Date:	2005-09-12
End Date:	Michael needs a job right away to pay his rent		
Note:			

Create Goal

2.22.2 CREATING AN OBJECTIVE

When a Goal has been defined and saved, you will need to define one or more objectives designed to achieve the set Goal. With the “Goals and Objectives: window open:

Click on “Create Objective”

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

fa Clients Search Adv Search Help

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Create Objective

Goal: Help him find a job

Objective: <User Defined Objective>

User Defined Title: Help him retain his own apartment

Priority: Priority 1 **Status:** Pending

Critical Date: 9/13/2005 **Approach:** Psychological

Start Date: 9/13/2005 **End Date:**

Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

Save **Cancel**

Select the appropriate items from the Drop Down List, or select User Defined Objective and type an objective into the text box, and then add whatever Notes are needed to explain the objective(s).

You can have several objectives for a given Goal, but you have to create each one separately.

The Objective will now be added to the Goal in the “Goals and Objectives” window.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington Cymh Outreach (1289) Active

Clients Search Adv Search Help

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Help him find a job

Goal Details:

- Priority: PRIORITY_1 Status: Active
- Critical Date: 2005-09-13
- Start Date: 2005-09-12
- End Date: Michael needs a job right away to pay his rent
- Note: Michael needs a job right away to pay his rent

OBJECTIVE: Help him retain his own apartment [In-Progress]

Object Details:

- Priority: PRIORITY_1 Status: Pending Activity
- Critical Date: 2005-09-13 Approach: Psychological
- Start Date: 2005-09-13
- End Date: He needs to keep his apartment where he has lived for three years and where he feels safe.
- Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

Page(s): 1 Create Goal

2.22.3 CREATING AN ACTION

Now that you have established the Goals and Objectives for the client, you can decide on what Action(s) to take to first achieve the Objective(s), which should then result in the achievement of the Goal(s).

With the Goals and Objectives window open:

Click on “Create Action”

(You will note that this button is in the “Objectives” part of the display. You can’t generate an Action until you have decided on an Objective.)

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington Cymh Outreach (1289) Active

Clients Search Adv Search Help

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Action

Objective: Help him retain his own apartment

Action: Help him write his resume by the 15th.

Priority: Priority 1 Status: Active

Critical Date: 9/13/2005 **End Date:** 9/15/2005

Note:

Save Cancel

Fill in the appropriate fields and select the appropriate items from the Drop Down Lists. “Action” is always a text entry.
Type in any Actions.
Add a Note if necessary
Click “Save”

The Action will be appended to the Goals and Objectives list.

To achieve the Objective you will probably need to take other Actions.

Click on “Create Action” again.

Fill in the fields and make the Drop Down List selections.
Click “Save”

The new Action will be added to the “Objective” in the “Goals and Objectives” window.

The screenshot shows the CARIS software interface. The top navigation bar includes 'CARIS', 'Build 0.57', 'Login Name: Ann@CYMH', 'Login Time: 9/13/2005 3:12:44 PM', and links for 'Clients', 'Search', 'Adv Search', and 'Help'. Below the navigation is a breadcrumb trail: 'Cases | Details | Relationships | Address Book | Close' followed by 'Cymh Outreach (1289) Active'. A sub-breadcrumb shows 'Summary | Participants | Case Plan | Activities | Close'. On the left, a sidebar titled 'CARIS' lists various modules: Waiting Lists, Beds, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, Case Notes, Case Forms, and Tools and Utilities. The main content area is titled 'Goals and Objectives'. It displays a table for 'GOAL: Youth Placement [In-Progress]'. The goal details are: Priority: PRIORITY_1, Status: Active, Critical Date: 2005-09-12, Start Date: 2005-09-12, End Date: (empty), Note: Michael needs a job right away to pay his rent. Below this is another table for 'OBJECTIVE: Help him retain his own apartment [In-Progress]'. The objective details are: Priority: PRIORITY_1, Status: Pending Activity, Approach: Psychological, Critical Date: 2005-09-13, Start Date: 2005-09-13, End Date: (empty), Note: He needs to keep his apartment where he has lived for three years and where he feels safe. Underneath these are two bullet points: 'ACTION: Help him write his resume by the 15th.' and 'ACTION: Arrange an interview at *Job Search Ltd. with Fred Blaggs.'. Both actions have their own tables with similar fields. At the bottom right of the main content area are buttons for 'Create Goal' and 'Page(s): 1'.

2.23 GENERATING THE CASE HISTORY

The “Activities” list is the Case History. You can view the Case specific “Activities” list at any time that the particular Case is “In Context”.

With the Client and Case “In Context”:

Click “Activities”

The screenshot shows the CARIS software interface. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Activities Display'. It features a 'Activity Filter' dropdown set to 'All Activities'. Below it is a list of activities, each preceded by a '+' sign. The activities listed are: Admitted by Ann (2005-08-25 15:34), Medication Intervention, Medication Intervention, Medication Intervention, Case Affiliate Update by Ann (2005-08-22 15:00), Client-Based Consultation by Ann (2005-08-22 14:28), Case Affiliate Update by Ann (2005-08-22 14:23), Case Affiliate Update by Ann (2005-08-22 14:24), Record Correspondence Log Event by Ann (2005-08-22 13:56), Case Member Update by Ann (2005-08-08 15:47:52.17), Client Alert by Ann (2005-08-05 13:38:05.91), and Accepted by Ann (2005-08-04 10:27:44.70). Each activity entry has an 'Edit' button to its right.

Each of the listed Activities can be expanded to view the details by clicking on the “+” sign beside the activity.

The Activity filter allows you to just view those activities that you are interested in, rather than the complete “History”. It also allows you to search during a specific time frame rather than for the entire period the Case has been open. This feature is useful when you have recorded many activities over a long period of time.

3 Functions

This Section will contain a description of each individual function, or window. These functions are usually found in the “Navigation Tree”.

3.1 ELIGIBILITY LIST MANAGEMENT

The Eligibility List is a record of activities and programs involving your Clients or other Clients. If you are authorized to do so, you can generate new activities or programs and add them to the list, and you can edit, delete, or complete existing ones. You can place your Client, and/or any Case Affiliates on any activity or program that is listed subject to acceptance by the activity or program coordinator.

The Status Filter allows you to select only the Lists you are interested in – “All” “Active” or “Completed”.

3.1.1 ADDING A NEW ELIGIBILITY LIST.

You do not have to have a Client or Case “In Context” to view the complete Eligibility List, and having either In Context will not affect the List display.

Expand the Eligibility List by clicking on the “►”.
Click on Management

The screenshot shows the CARIS software interface. At the top, there is a navigation bar with the CARIS logo, build information (Build 0.67), login details (Login Name: Ann@CYMH, Login Time: 8/19/2005 2:36:36 PM), and search fields. Below the navigation bar, the user profile "Michael Farrington" is displayed with a photo icon and a red square with a white letter 'A'. There are links for Cases, Details, Relationships, Address Book, and Close. On the left, a vertical navigation menu is open under the 'CARIS' section, showing 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists' (which is selected and highlighted in blue), 'Management', 'Summary', 'Reports', 'Facility Notes', and 'Tools and Utilities'. The main content area is titled 'Eligibility List Management'. It features a table with columns: List Name, Start Date, End Date, Min, Max, Status, and Notes. Two rows are visible: 'Computer Literacy' (Start Date: 2005-08-02, End Date: 2005-08-03, Min: 5, Max: 20, Status: Active) and 'List' (Start Date: 2005-07-15, End Date: 2005-07-22, Min: 2, Max: 8, Status: Active). To the right of the table are buttons for 'Edit', 'Delete', and 'Complete'. A dropdown menu labeled 'Status Filter' is set to 'Active'. At the bottom right of the table area, there is a link 'Add List'.

To add a new program or activity to the list, if you are authorized to do so:

Click on “Add List”

A form will display containing fields for you to describe the activity or program offered.

CARIS

Build 0.67 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Eligibility List

List Name:	<input type="text"/>		
Start Date:	<input type="text"/> 9/7/2005	End Date:	<input type="text"/> 3/7/2006
Minimum Participants:	<input type="text"/> 1	Maximum Participants:	<input type="text"/> 15
List Description: <input type="text" value="A weekly class to stimulate creativity by using various mental exercises and games."/>			

Save Cancel

Fill in the fields using the Drop Down Lists and text fields.

Some fields are mandatory, and a prompt will display if these fields are not completed prior to clicking “Save”

CARIS

Build 0.67 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Eligibility List

List Name:	<input type="text"/> Mental Aerobics		
Start Date:	<input type="text"/> 9/7/2005	End Date:	<input type="text"/> 3/7/2006
Minimum Participants:	<input type="text"/> 4	Maximum Participants:	<input type="text"/> 15
List Description: <input type="text" value="A weekly class to stimulate creativity by using various mental exercises and games."/>			

Save Cancel

5) Click “Save”

CARIS

Build 0.67 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington A

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Eligibility List Management

List Name	Start Date	End Date	Min	Max	Status	Notes	Status Filter:
Computer Literacy	2005-08-02	2005-08-03	5	20	Active	<input type="checkbox"/>	<input type="button"/> Edit <input type="button"/> Delete <input type="button"/> Complete
List	2005-07-15	2005-07-22	2	8	Active	<input type="checkbox"/>	<input type="button"/> Edit <input type="button"/> Delete <input type="button"/> Complete
Mental Aerobics	2005-09-07	2006-03-07	4	15	Active	<input type="checkbox"/>	<input type="button"/> Edit <input type="button"/> Delete <input type="button"/> Complete

Status Filter: Active

Page(s): 1

Add List

The new program or activity has been added.

3.1.2 EDITING AN ELIGIBILITY LIST

To make changes to a List, if you are authorized to do so:

Open the Eligibility list Management window

Select the List you wish to edit

Click on “Edit”.

The screenshot shows the CARIS software interface. At the top, there is a header bar with the CARIS logo, build information (Build 0.57), login details (Login Name: Ann@CYMH, Login Time: 8/19/2005 2:36:36 PM), and navigation links (Clients, Search, Adv Search, Help). Below the header is a user profile for Michael Farrington with a photo icon and a red 'A' symbol. A toolbar below the profile includes links for Cases, Details, Relationships, Address Book, and Close. On the left, a vertical navigation menu is open under the 'CARIS' heading, showing options like Waiting Lists, Beds, Internal Referrals, Case Transfers, and Eligibility Lists. The 'Eligibility Lists' option is selected and expanded, showing Management and Summary links. The main content area is titled 'Edit Eligibility List'. It contains fields for List Name (Computer Literacy), Start Date (8/2/2005), End Date (8/3/2005), Minimum Participants (5), Maximum Participants (20), and a List Description (Determination of computer literacy as a prelude to course offerings). At the bottom right of the form are 'Save' and 'Cancel' buttons.

You can now make changes to the List.

NOTE: If you are NOT authorized to create, edit, delete or complete Eligibility lists. The option buttons will be grayed out, and you won't be able to open the windows.

3.1.3 DELETING AN ELIGIBILITY LIST

If, for any reason - such as insufficient participants, you wish to delete a List, *if you are authorized to do so*:

Open the Eligibility list Management window-

Select the List you wish to delete

Click on “Delete”.

The list will be deleted and will not show up on the display even when the “All” option is selected in the Status Filter.

3.1.4 COMPLETING AN ELIGIBILITY LIST.

Completing a List means that you – *if you are authorized to do so* – are satisfied that the participation level is acceptable and you are closing the List to further participants and proceeding with the activity or program.

To complete a List:

Open the Eligibility list Management window

Select the List you wish to complete.

6) Click on “Complete”.

The screenshot shows the CARIS software interface. At the top, there's a header bar with the CARIS logo, build information (Build 0.57, Login Name: Ann@CYMH, Login Time: 9/19/2005 2:36:36 PM), and navigation links (Clients, Search, Adv Search, Help). Below the header is a user profile for Michael Farrington. The main content area is titled "Cymh Outreach (1289) Active". On the left, there's a sidebar with a tree view of modules: CARIS (Waiting Lists, Beds), Internal Referrals, Case Transfers, Eligibility Lists (Management Summary, Participants), Reports, Facility Notes, Case Notes, Case Forms, and Tools and Utilities. The "Eligibility Lists" node is expanded, showing its sub-items. The right side of the screen displays the "Complete Eligibility List" for the "Computer Literacy" list. It shows details like Start Date (2005-08-02), End Date (2005-08-03), Minimum Participants (5), and Maximum Participants (20). A table lists participants: Michael Farrington, ID 1, with a priority of 1 and a date added of 2005-09-19. At the bottom right are "Complete List" and "Cancel" buttons.

The display will indicate the status of the List and provide details of the participants.

If you are satisfied with the number of participants and wish to continue with the activity:

Click “Complete List”

A prompt will display asking if you want to “complete” the List.



Click “OK”.

The activity will be removed from the “Active” list and will only be included if you select “All” or “Completed” in the Status Filter.

3.1.5 ELIGIBILITY LIST SUMMARY

The Summary displays all the Lists that are either “Active” or “Completed”, depending on the Status Filter selection.

Cymh Outreach (1289) Active

List Name	Start Date	End Date	Min	Max	Status	Notes
Computer Literacy	2005-08-02	2005-08-03	5	20	Complete	View
Computer Literacy	2005-08-02	2005-08-03	5	20	Active	View
List	2005-07-15	2005-07-22	2	8	Complete	View
List	2005-07-15	2005-07-22	2	8	Active	View
Mental Aerobics	2005-09-07	2006-03-07	4	15	Active	View

You can view the details of any List.

Select the List you wish to have a look at, and:
Click on “View”

View Eligibility List

List Name:	Computer Literacy		
Start Date:	2005-08-02	End Date:	2005-08-03
Minimum Participants:	5	Maximum Participants:	20
Current Participants:	0		
List Description:	Determination of Computer Literacy as a prelude to course offerings		
Participant Name	Priority	Case #	Date Added

3.1.6 ADDING A PARTICIPANT TO AN ELIGIBILITY LIST.

From the “Eligibility List Summary window (Section 3.1.5)

Click on “Add Participant”.

NOTE: You must have a Client and Case “In Context” to be able to add a participant.

Cymh Outreach (1289) Active

Add Participant

Eligibility List: Computer Literacy Max Participants: 20

Participant:

Priority:

Save **Cancel**

You may select the Client or any Affiliate to participate in the program or activity, and you may designate a priority for that participation.

Once you have made your selection:

Click "Save"

View Eligibility List

List Name: Computer Literacy

Start Date: 2005-08-02 End Date: 2005-08-03

Minimum Participants: 5 Maximum Participants: 20

Current Participants: 1

List Description: Determination of Computer Literacy as a prelude to course offerings

Participant Name	Priority	Case #	Date Added
Farrington, Michael	1	1289	2005-09-19

Edit **Delete**

Page(s): 1

Add Participant **Cancel**

The person will be added to the List and you may then add another Participant if you wish.

You may also change the Priority of a Participant:

Click on "Edit"

Edit Participant

Eligibility List: Computer Literacy Max Participants: 20

Participant:

Priority:

Save **Cancel**

Change the "Priority"
"Save"

3.2 REPORTS

The system provides the capability to generate both Ad Hoc and Case Specific reports.

3.2.1 AD HOC REPORTS

The system provides a method for producing Ad Hoc reports based on a number of filter elements. By selecting the elements you need for the report from the drop down lists, a report which contains only the selected elements will be generated.

To generate an Ad Hoc report:

Click on “Ad Hoc Report” under the “Reports” heading on the navigation tree.

The screenshot shows the CARIS software interface. On the left is a navigation tree with categories like CARIS, Beds, Reports, and Facility Notes. Under Reports, 'Ad Hoc Report' is selected. The main area is titled 'Ad Hoc Report' and contains several filter sections: 'Administrator Filter' (Report Type set to 'Client'), 'Demographics Filter' (Gender set to 'Male', Minimum Age set to '12'), 'Extended Demographics Filter' (multiple dropdowns for various demographic details), 'Locations Filter' (City, Province, Postal Code, Country), and 'Activities Filter' (Activity Types dropdown listing items like 'All', 'Accept Activity', etc.). At the bottom are date fields for 'Start Date' (7/26/2005) and 'End Date' (8/26/2005), and a 'Return Cost' checkbox. Buttons for 'Submit' and 'Cancel' are at the bottom right.

The Report form will display.

Select the criteria (filters) that you require for your report
Click “Submit”

The results will display as a report.

Client Report Grouped by Date

Governance:	PSDHH	Start Date:	7/26/2005
Generated By:	training1	End Date:	8/26/2005
Date and Time Generated:	8/26/2005 10:58:03 AM		

Search Criteria

Administrator Filter			
Staff Member(s):	Client		
Group By:	Demographic Filter		
Gender:	Male		
Minimum Age:	12	Maximum Age:	100
<u>Extended Demographics Filter</u>			
Aboriginal Origin:	Non-aboriginal		
Activity Filter			
Start Date:	7/26/2005	End Date:	8/26/2005

Client: Brown, Gustavo

Demographics			
Family Name:	Brown	Given Name:	Gustavo

Activities

2005-08-25 15:03:00
2005-08-25 15:03:00

Client: Denim, Daisy

Demographics			
Family Name:	Denim	Given Name:	Daisy

Activities

2005-08-25 15:03:00

Client: Farrington, Michael

Demographics			
Family Name:	Farrington	Given Name:	Michael

Activities

2005-08-25 15:03:00

Client: James, Robert S

Demographics			
Family Name:	James	Given Name:	Robert

Activities

2005-08-25 00:00:00
2005-08-25 00:00:00
2005-08-25 15:24:00

Client: Tree, Admiral

Demographics			
Family Name:	Tree	Given Name:	Admiral

Activities

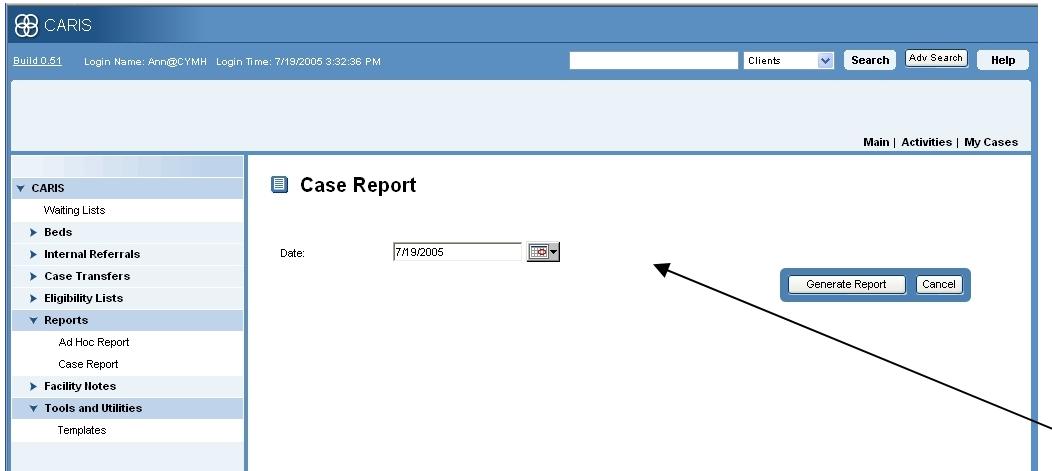
2005-08-22 00:00:00
2005-08-22 00:00:00
2005-08-22 15:37:00
2005-08-22 00:00:00
2005-08-22 15:40:00
2005-08-22 15:40:00

3.2.2 CREATING A CASE REPORT

The system also provides a method for preparing Case reports. These reports summarize the case statistics for the entire agency.

To generate a Case Report:

Click on “Case reports” under the “reports” heading on the navigation tree.



Select the date for which you want the report.

The report will be automatically generated.

Program	Referral	Pre Admit	Active	Followup	Closed	Total
Cymph Program 1	1	0	1	0	0	2
Cymph Program 2	0	0	1	0	0	1
Total by Case Phase	1	0	2	0	0	3

Gender	< 18	18-25	26-35	36-45	46-55	56 >	Total
male	1	0	1	0	0	0	2
female	0	1	0	0	0	0	1
Total by Age	1	1	1	0	0	0	3

Statistics	
# of Distinct Clients Served	3
Average Cases per Client	1
Female	1 (0.3333333333333333 %)
Male	2 (0.6666666666666666 %)

3.3 ORGANIZATION NOTES (ALSO REFERRED TO AS "FACILITY NOTES")

Organization Notes are a group of functions that provide you with the capability of recording events such as meetings, phone calls, e-mails and so on of a general nature, that is, not Client or Case specific, with which you are involved in some manner.

NOTE: Events recorded in this Log are not secure in that they can be viewed by any other authorized user, as can Announcements, Incident Reports and so on. **ORGANIZATION NOTES ARE VIEWABLE BY ANY OTHER AUTHORIZED USER AT YOUR LOCATION.** Consequently, when you are in Client and/or Case Context, **ALWAYS** use the "Client Correspondence Log" to record phone calls, e-mails etc., that are client or case specific.

Events are recorded permanently but are only displayed for 30 days following the event. If you wish to view an event that occurred more than thirty days previously, use the Time Filter to select a date

within thirty days following the estimated date of the event you wish to view. Following is an example of recording an administrative event.

3.3.1 CREATING AN ANNOUNCEMENT

An announcement is a message intended for everyone at a given location or agency. This is typically an administrative function to enable administrators to notify staff of impending events or other useful information, others in the location may have the option of creating announcements too.

Announcements show up automatically on the main page of each user upon log-in.

The screenshot shows the CARIS software interface. The left sidebar has a tree view with 'CARIS' expanded, showing 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Reports', and 'Facility Notes'. 'Facility Notes' is expanded, showing 'Administrative Log', 'Announcement', 'Facility Incident Report', 'Safety Procedure', and 'Topic-Based Consultation'. The main content area displays a 'Welcome Ann@PSDHH' message and a 'Announcements' section. The announcements table has two rows:

Date	Subject	Importance	Detail	Action
2005-07-13	Happy summer vacation!	Medium	See you August 30 and 31 for followup CARIS orientation.	<input type="button" value="Delete"/>
2005-09-01	Meeting	High	Meeting with MF and parents with constable jackson	<input type="button" value="Delete"/>

Below the table are buttons for 'Time Filter' (set to 'Last 2 Month') and 'Add'. At the bottom right is a 'Page(s): 1' indicator. A large arrow labeled '1)' points from the right side towards the 'Announcements' section.

To add an announcement to the list:

Click "Add" on your Main Page.

The screenshot shows the 'Create Announcement' window. The left sidebar is identical to the main page. The main content area has a title 'Create Announcement'. It contains four input fields: 'Date' (2005-09-01), 'Subject' (TB Consultations), 'Importance' (High), and a 'Detail' text area with placeholder text: 'Please ensure that you enter the "End Date" correctly when recording a Topic Based Consultation.' At the bottom are 'Save' and 'Cancel' buttons.

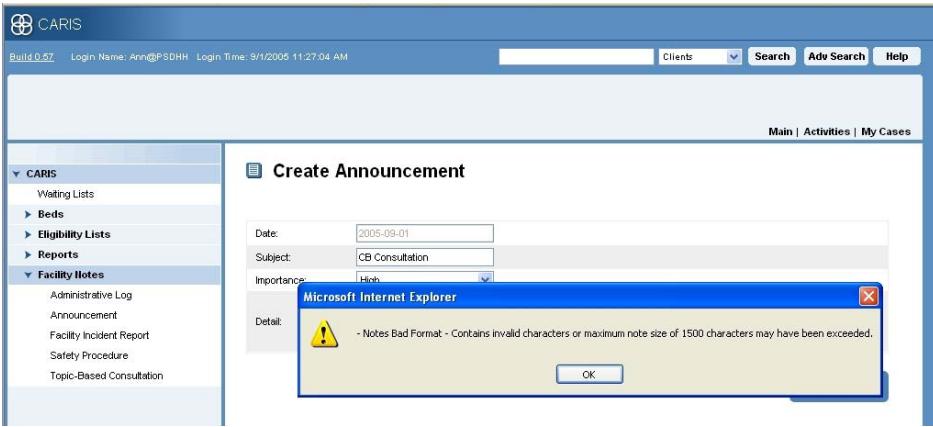
The Create Announcement window always shows today's date.

Fill in the subject and importance fields

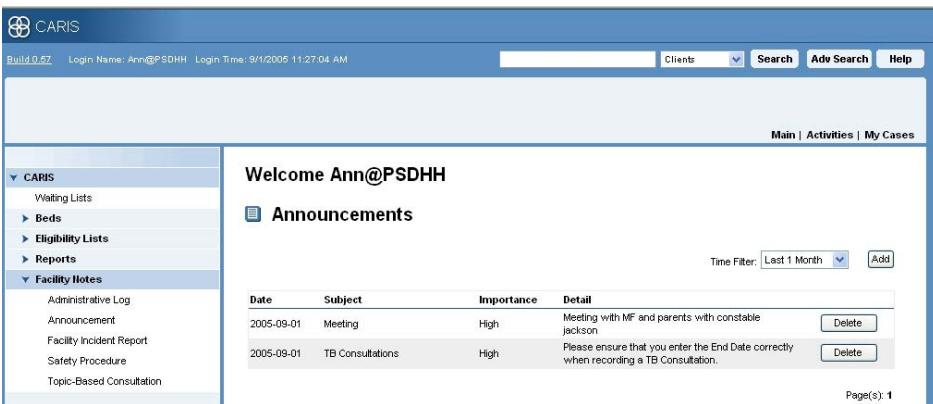
Add your announcement

Click Save

If you see this prompt:



Check the way you have written your details. The system doesn't like odd characters and symbols, so sometime it will reject them. In this case it doesn't like the "Quotes" around "End Date". Remove them and your announcement is accepted.



Your announcement shows up on everyone's Main Page.

3.3.2 DELETING AN ANNOUNCEMENT

Deleted messages disappear from everyone's Main Page, so be careful before you delete an Announcement.

If you are authorized to delete announcements, the "Delete" button will be active. If you are not authorized to perform this action, the button will be grayed out.

To delete an announcement:

Click "delete" for that particular announcement.

The announcement will disappear.

3.3.3 LOGGING A COMMUNICATION NOTE

Various events occurring in the agency require logging for future reference. The business practices of the agency will indicate which events require logging. To log an event:

Open "Communication Notes" under the "Organization Notes" heading in the navigation tree.

You will see a list of logged communication notes.

The screenshot shows the CARIS software interface. The top navigation bar includes 'mar', 'Clients', 'Search', 'Adv Search', and 'Help'. The left sidebar has a tree view with 'YFV CARIS' expanded, showing 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Internal Referrals', 'Case Transfers', 'Reports', 'Organization Notes' (expanded), 'Communication Notes', 'Announcement', 'Facility Incident Report', 'Safety Procedure', 'Topic-Based Consultation', 'External Services', and 'Tools and Utilities'. The main content area is titled 'Communication Notes' and displays a table of communication notes. The table columns are Date, Type, Method, Duration, and Notes. The notes column contains small edit icons. A time filter dropdown is set to '4 Weeks'. At the bottom right of the main area are 'Add Note' and 'Cancel' buttons.

Date	Type	Method	Duration	Notes
2005-09-21	Referral	Email	Unknown Status	
2005-09-21	Advocacy	Walk-in	Unknown Status	
2005-09-21	Referral	Phone	Unknown Status	
2005-09-21	Service Request	Walk-in	Unknown Status	
2005-09-14	Advocacy	Fax	5 mins	
2005-09-12	Education	Mail/Courier	60 mins	
2005-09-08	Advocacy	Phone	50 mins	
2005-08-30	Referral	Email	5 mins	

Click on “Add Note”

While this feature is used primarily to log phone calls and other forms of communication, it can be used to record other events in the “Notes” portion of the form.

The screenshot shows the 'Create Communication Note' form. The left sidebar is identical to the previous screenshot. The main form has a title 'Create Communication Note'. It contains fields for 'Date' (set to 9/22/2005), 'Type' (set to 'Information'), 'Contact Method' (set to 'Phone'), and 'Duration (minutes)' (set to '15'). Below these is a 'Notes' text area containing the text 'Wednesday's meeting is at 2:00p.m. instead of 1:30 p.m.' At the bottom right are 'Save' and 'Cancel' buttons.

Make the appropriate selections from the Drop Down Lists and add a Note describing the event.
Click “Save”.

The event will then be recorded and displayed on the Communication Notes page for 30 days. At the end of 30 days it will disappear off the page but can be retrieved for viewing by using the Time Filter to select a date within thirty days following the event.

3.3.4 LOGGING TELEPHONE CALLS, FAXES, E-MAILS.

To record general communications such as telephone calls, faxes and e-mails,

Expand the “Organization Notes” section on the Navigation Tree.

The screenshot shows the CARIS software interface. At the top, there is a header bar with the CARIS logo, login information ('Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM'), and search functions ('Search', 'Adv Search', 'Help'). Below the header is a navigation tree on the left side. A large arrow labeled '1)' points to the 'Organization Notes' item under the 'YFV CARIS' section. The main content area displays a 'Welcome Ann@YFV' message and an 'Announcements' section. Below that is a table of communication notes with columns for Date, Subject, Importance, and Detail. A 'Time Filter' dropdown is set to 'Last 1 Month'.

Date	Subject	Importance	Detail	Action
2005-08-30	tt	High	zxcv	<button>Delete</button>
2005-08-30	test	High	zxcv	<button>Delete</button>
2005-08-30	thtyhy	High	htyhyh	<button>Delete</button>
2005-09-01	tgtgtg	Medium	rtgrtg	<button>Delete</button>
2005-09-16	sdf	High	sdf	<button>Delete</button>

Page(s): 1

Click on “Communication Notes”

The Communication Notes window will display.

This screenshot shows the 'Communication Notes' window. The navigation tree on the left is identical to the previous one. A large arrow labeled '1)' points to the 'Add Note' button at the bottom right of the main content area. The main content area displays a table of communication notes with columns for Date, Type, Method, Duration, and Notes. A 'Time Filter' dropdown is set to '4 Weeks'.

Date	Type	Method	Duration	Notes	Action
2005-09-21	Referral	Email	Unknown Status	<input type="checkbox"/>	<button>Edit</button>
2005-09-21	Advocacy	Walk-in	Unknown Status	<input type="checkbox"/>	<button>Edit</button>
2005-09-21	Referral	Phone	Unknown Status	<input type="checkbox"/>	<button>Edit</button>
2005-09-21	Service Request	Walk-in	Unknown Status	<input type="checkbox"/>	<button>Edit</button>
2005-09-14	Advocacy	Fax	5 mins	<input type="checkbox"/>	<button>Edit</button>
2005-09-12	Education	Mail/Courier	60 mins	<input type="checkbox"/>	<button>Edit</button>
2005-09-08	Advocacy	Phone	50 mins	<input type="checkbox"/>	<button>Edit</button>
2005-08-30	Referral	Email	5 mins	<input type="checkbox"/>	<button>Edit</button>

1)

Add Note Cancel

Page(s): 1

To record a new phone call, fax or e-mail,

Click on “Add Note”

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM mar Clients Search Adv Search Help

Jason Marceau A

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- ▼ Organization Notes
- Communication Notes
- Announcement
- Facility Incident Report
- Safety Procedure
- Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method:

Duration (minutes):

Notes:

Save Cancel

Today's date will automatically default to the date line, but, if you have hand recorded calls from an earlier date, and you wish to record them, you can select the appropriate date from the drop down calendar.

Select the type of communication from the drop down list.

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM mar Clients Search Adv Search Help

Jason Marceau A

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- ▼ Organization Notes
- Communication Notes
- Announcement
- Facility Incident Report
- Safety Procedure
- Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method: Email

Duration (minutes):

Notes:

Save Cancel

Then select the "Contact Method".

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM mar Clients Search Adv Search Help

Jason Marceau A

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- ▼ Organization Notes
- Communication Notes
- Announcement
- Facility Incident Report
- Safety Procedure
- Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method: Email

Duration (minutes): 25

Notes:

Save Cancel

Then the "Duration" of the event.

The screenshot shows the CARIS software interface. At the top, there's a header with the CARIS logo, login information (Login Name: Ann@YFV, Login Time: 9/22/2005 2:22:43 PM), and navigation links (Clients, Search, Adv Search, Help). Below the header, the main window displays "Program C (39147) Active". On the left, there's a sidebar with a user profile (Jason Marceau) and a navigation menu under "YFV CARIS" which includes "Waiting Lists", "Beds", "Eligibility Lists", "Internal Referrals", "Case Transfers", "Reports", and "Organization Notes". Under "Organization Notes", there are sub-options: "Communication Notes", "Announcement", "Facility Incident Report", "Safety Procedure", and "Topic-Based Consultation". The main content area is titled "Create Communication Note". It contains fields for "Date" (set to 9/22/2005), "Type" (set to "Service Request"), "Contact Method" (set to "Email"), "Duration (minutes)" (set to 25), and a "Notes" text area containing the text: "Basil will be unable to attend the Friday meeting, his mother is ill.". At the bottom right of the form are "Save" and "Cancel" buttons.

Add whatever notes you wish.

If you wish to append an e-mail to the record for future reference, you can:

- Open the e-mail**
- Select “All” and “Copy” to obtain the body of the e-mail and the address and details of the sender.**
- Paste it into the “Notes” section of the Communication Notes above.**
- Click “Save”.**

A prompt will display asking if you are sure you wish to Save this event.



Click “OK” and it will be saved and recorded in your “Communication Notes”.

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Communication Notes

Date	Type	Method	Duration	Notes	Time Filter:
2005-09-22	Information	Phone	15 mins	[Edit]	4 Weeks
2005-09-22	Service Request	Email	25 mins	[Edit]	
2005-09-21	Referral	Email	Unknown Status	[Edit]	
2005-09-21	Advocacy	Walk-in	Unknown Status	[Edit]	
2005-09-21	Referral	Phone	Unknown Status	[Edit]	
2005-09-21	Service Request	Walk-in	Unknown Status	[Edit]	
2005-09-14	Advocacy	Fax	5 mins	[Edit]	
2005-09-12	Education	Mail/Courier	60 mins	[Edit]	
2005-09-08	Advocacy	Phone	50 mins	[Edit]	
2005-08-30	Referral	Email	5 mins	[Edit]	

Page(s): 1

Add Note | Cancel

3.3.5 RECORDING A SAFETY EVENT (FIRE, SMOKE, TEST)

To record a safety incident or event:

Click on “Safety Procedure” in the navigation tree under “Organization Notes”. Fill in the appropriate fields, using the drop down list to identify the type of event.

Safety Procedure

Date: 8/22/2005 Time: 12:00 AM

Procedure Type: Smoke Detectors

Notes: Small fire in washroom caused by cigarette in waste basket.

Add Attachment: Fire Report.doc (29KB)

Submit | Cancel

**Add an attachment if available
Submit**

The incident will be recorded in the “Activities” file.

3.3.6 LOGGING A TOPIC BASED CONSULTATION

A Topic Based Consultation is an event during which two or more people discuss or consult together about a specific subject, or topic that may be clinical but does not have to do with a particular client.. The system provides a convenient form in which you can record the significant features of such an event.

Under the heading “Organization Notes” in the navigation tree:

Click on “Topic Based Consultation”

This window will display.

You can see that there are many convenient fields in which to enter the pertinent data. Many are drop down lists to speed up the process, while some are text boxes in which to record notes or observations. Attachments can be added to the file, such as minutes or reports.

A Partner in this context is an individual or agency which is a co-presenter of the event, while a Recipient is the audience to whom the event is directed.

**Fill in the fields as completely as possible
Add Notes or attachments
Enter the start/finish dates.**

Note that, when you fill in the partner and recipient fields, you must click “Add” to effect the insertion, leaving them, as in the case of the Recipient above, will initiate a prompt when you try to Record the Consultation. The same is true of the Attachments, you first browse to locate the document, then click “Add” to include it.

Click “Record Consultation.”

The recorded event displays in the “Activities” file.

3.4 CASE NOTES

The Case Notes group of functions provide you with a variety of convenient ways to record activities and events that concern your Clients and their Cases. The “Case Notes” Group only display on your navigation tree when a Client and Case are “In Context”.

An event or activity that is recorded when both a Client and a Case are “In Context” will only be viewable when the same Client and Case are “In Context”.

3.4.1 ATTACHING A FILE

To attach a file to a specific Case:

Bring the Client and Case into Context.
Expand “Case notes” in the navigation tree.

The Attach File window will display.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington [A]

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

CARIS

- Waiting Lists
- Beds
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Case Notes**

General Alerts
Attach File

Attach File

Document Name:

Attachment: [Browse...]

[Add] [Detach]

Submit Cancel

**Give the document a name
Browse to locate the file you wish to attach
Click on it to bring it into the “Attachment” field.**

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington [A]

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

CARIS

- Waiting Lists
- Beds
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Case Notes**

General Alerts
Attach File
Client-Based Consultation
Client Correspondence Log

Attach File

Document Name: Notice

Attachment: W:\fs01\Users\Profiles\mike@LTMy Documents\My Documents\mike\spers [Browse...]

[Add] [Detach]

Submit Cancel

Click “Add”

The attachment will be listed and you can then browse to find another file if you wish.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington [A]

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

CARIS

- Waiting Lists
- Beds
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Case Notes**

General Alerts
Attach File
Client-Based Consultation

Attach File

Document Name: Notice

Attachment: HALEY.doc (32KB)

[Browse...]

[Add] [Detach]

Submit Cancel

3.4.2 DETACHING A FILE

If you change your mind, you can detach the attached file.

Highlight it

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Attach File

Document Name: Notice

Attachment: Browse... Add Detach

HALEY.doc (32KB)

Submit Cancel

Click “Detach”

If you are satisfied with the attachment and don't want to add any others:

Click “Submit”

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Activities Display

Activity Filter: All Activities

File Attachment by Ann (2005-09-20 11:57)

Page(s): 1

The attachment will be recorded in the Case specific “Activities” file.

3.4.3 LOGGING A CLIENT BASED CONSULTATION

A Client based consultation is a conversation or consultation with another person(s) concerning a specific client/case.

A client and case must be in context.

Michael Farrington

Cymh Outreach (1289) Pre-Admit

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Actions: Reject Referral, Accept Referral, Cancel Case, Admit, Discharge, Close Case.

Open Case Notes
Click on “Client Based Consultation”
Fill in the appropriate fields.

NOTE: Click on the “Facilitator(s) and “Affiliates” to select them. If you want more than one, hold down the “Shift” key to select multiple names. The “Recipient” is the person with whom you are consulting about your client.

Michael Farrington

Cymh Outreach (1289) Pre-Admit

Client Based Consultation

Topic:	Measles
Mode:	Telephone
Start Date:	8/22/2005
End Date:	8/22/2005
Duration:	
Facilitators:	One, Ann_3 Huber, Anna-Maria
Affiliates Attending:	Reginald, David Dean, Steve
Recipient:	Dr. Jones (Service 1)
Service Prov. Type:	
Add Delete	
Notes:	
Add Attachment:	Browse... Add Delete

Actions: Record Consultation, Cancel.

Click “Record Consultation” to save the form.

The consultation will be saved in the “Activities” file.

NOTE: The consultation will only be available in the “Activities” list when the client/case are in context. It will not display in the general “Activities” summary.

3.4.4 LOGGING CLIENT CORRESPONDENCE

To record client or case specific communications, you must first:

**Bring the appropriate client into context.
Bring the applicable Case into context.**

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

- 7) Expand “Case Notes” and
- 8) Click on “Client Correspondence Log”.

CARIS

Build 0.55 Login Name: Ann@CYMH Login Time: 8/22/2005 1:54:00 PM

Michael Farrington [A]

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Correspondence Log

Time Filter: 8/22/2005

Event Id	Date	Direction	Type	Method	Duration	Notes

Page(s): 1

Add Event Cancel

Click “Add Event”

CARIS

Build 0.55 Login Name: Ann@CYMH Login Time: 8/22/2005 1:54:00 PM

Michael Farrington [A]

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Create Correspondence Log

Date: 8/22/2005

Direction: Incoming Outgoing

Type: Informational

Method: Phone

Duration (minutes): 20

Notes: called to say Michael is sick and can't get to his appointment today.

Save Cancel

**Fill in the fields and
Click on “Save”**

The call will be saved in the correspondence log attached to that particular client/case file.

Michael Farrington

Cymh Outreach (1289) Pre-Admit

Correspondence Log

Event Id	Date	Direction	Type	Method	Duration	Notes
8073	2005-08-22	Incoming	Informational	Phone	20 mins	Time Filter: 8/22/2005

Page(s): 1

Add Event Cancel

3.4.5 GENERATING PROGRESS NOTES

Progress Notes are a record of the activities and events involving a specific Client/Case. They provide a record of the progress of the case throughout its life, as recorded by the Case Manager and Member(s).

To record a Case Progress Note, with the Client and Case “In Context”:

Expand “Case Notes
Click on “Progress Notes”

Michael Farrington

Cymh Outreach (1289) Active

Progress Notes

Progress Notes

Note Date: 9/14/2005

Progress Notes: Michael started putting together his resume today and says he will have it finished tomorrow.

Add Attachment:

Goals & Objectives

GOAL: Youth Placement

OBJECTIVE: Help him retain his own apartment

Create Note Cancel

The Note date defaults to today's date, but you can select a different date if you need to.

Fill in the various fields as required, and add the note that you wish to record.
Click “Create Note”.

(If you wish to check the “Objectives” click on Case Plan and the “Goals and Objective” window will display.)

The screenshot shows the CARIS software interface. At the top, it displays "CARIS" and the user information "Build 0.57 Login Name: Ann@CYMH Login Time: 9/14/2005 10:28:27 AM". The main title is "Michael Farrington" and the case status is "Cymh Outreach (1289) Active". Below the title, there are links for "Cases | Details | Relationships | Address Book | Close" and "Summary | Participants | Case Plan | Activities | Close". On the left, a sidebar menu under "Case Notes" includes "General Alerts", "Attach File", "Client-Based Consultation", "Client Correspondence Log", and "Progress Notes". The main content area is titled "Activities Display" and shows a record for "Progress Notes Observation by Ann (2005-09-14 10:30)". An "Edit" button is located at the top right of this record. A callout arrow points from the text "(If you wish to check the “Objectives” click on Case Plan and the “Goals and Objective” window will display.)" to this "Edit" button.

The record will display in the “Activities” file.
You can make changes to the record by clicking on “Edit”.

3.4.6 LOGGING HEALTH VISITS

If your client makes a visit to a physician, hospital, clinic or other health related facility, you can record the visit using this form.

To record a Health Visit, with the Client and Case “In Context”:

Expand “Case Notes”
Click on “Health Visit”

The screenshot shows the CARIS software interface. At the top, it displays "CARIS" and the user information "Build 0.57 Login Name: Ann@CYMH Login Time: 9/14/2005 10:28:27 AM". The main title is "Michael Farrington" and the case status is "Cymh Outreach (1289) Active". Below the title, there are links for "Cases | Details | Relationships | Address Book | Close" and "Summary | Participants | Case Plan | Activities | Close". On the left, a sidebar menu under "Case Notes" includes "General Alerts", "Attach File", "Client-Based Consultation", "Client Correspondence Log", "Progress Notes", "Health Visit", "Referral Observation", "Session Notes", "Legal Code", "Case Forms", and "Tools and Utilities". The main content area is titled "Health Visit" and contains a form with fields for "Appointment Type" (Medical), "Topic/Subject" (Bad cough), "Health Professional's Name" (Dr Jackson), "Phone Number" (250 - 5551213), "Ext.", "Mode of Meeting" (Face to Face), "Note" (This is a persistent cough. Michael is a smoker.), "Attachment" (Browse, Add, Delete), "Start Time" (9/14/2005), "End Time" (9/14/2005), and "Goals & Objectives". A callout arrow points from the text "Select the appropriate items from the Drop Down Lists. Enter the correct date and times of the visit." to the "Start Time" and "End Time" fields.

Select the appropriate items from the Drop Down Lists.
Enter the correct date and times of the visit.

**Add a note explaining the visit.
Attach a document if you wish to.
Click on “Record”**

The screenshot shows the CARIS software interface. At the top, it says "CARIS" and "Build 0.57 Login Name: Ann@CYMH Login Time: 9/14/2005 10:28:27 AM". Below that is a navigation bar with links like "Cases | Details | Relationships | Address Book | Close". The main title is "Cymh Outreach (1289) Active". Underneath are links for "Summary | Participants | Case Plan | Activities | Close". On the left, there's a sidebar with a tree view of "CARIS" categories: Waiting Lists, Beds, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, and Case Notes. "Case Notes" is expanded, showing sub-options: General Alerts, Attach File, Client-Based Consultation, Client Correspondence Log, Progress Notes, and Health Visit. The main content area is titled "Activities Display". It shows a list with one item: "Health Visit Recorded by Ann (2005-09-14 10:35)" with an "Edit" button next to it. There are also "Activity Filter: All Activities" and "Page(s): 1" dropdowns.

**The record will display in the “Activities” file.
You can make changes to the record by clicking the “Edit” button.**

3.4.7 MAKING REFERRAL OBSERVATIONS

When you refer a Client to another facility, you will need to record the reason why the referral was made. This form enables you to do that.

To record a Referral Observation, with the Client and Case “In Context”:

**Expand “Case Notes”
Click on “Referral Observation”**

The screenshot shows the CARIS software interface. At the top, it says "CARIS" and "Build 0.57 Login Name: Ann@CYMH Login Time: 9/14/2005 10:28:27 AM". Below that is a navigation bar with links like "Cases | Details | Relationships | Address Book | Close". The main title is "Cymh Outreach (1289) Active". Underneath are links for "Summary | Participants | Case Plan | Activities | Close". On the left, there's a sidebar with a tree view of "CARIS" categories: Waiting Lists, Beds, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, and Case Notes. "Case Notes" is expanded, showing sub-options: General Alerts, Attach File, Client-Based Consultation, Client Correspondence Log, Progress Notes, Health Visit, Referral Observation, Session Notes, Legal Code, Case Forms, and Tools and Utilities. The main content area is titled "Referral Observation". It contains fields for "Date" (9/14/2005), "Referral Target" (Maples), "Referral Reason" (Reason 1), and a "Notes" text area (Maples staff have been contacted). Below these are "Add Attachment" buttons (Browse..., Add, Detach) and a "Goals & Objectives" section with a goal of "Youth Placement" and an objective of "Help him retain his own apartment". At the bottom right are "Create Note" and "Cancel" buttons.

**Select the appropriate items from the Drop Down Lists.
Enter the correct date of the referral.
Add a note explaining the reason for the referral.
Attach a document if you wish to.
Click on “Create Note”**

The record will display in the “Activities” file.

3.4.8 RECORDING SESSION NOTES

Session Notes are a record of what occurred during a formal meeting with a Client and/or other Case Members.

To record Session Notes, with the Client and Case “In Context”:

**Expand “Case Notes”
Click on “Session Notes”**

Select the appropriate items from the Drop Down Lists.
Enter the correct date and duration of the Session.
Enter the names and Roles of the people attending the Session.

NOTE: You must at least put your own name and role in before you can create the note.

Click on “Add” to record the Member(s) in attendance.

The screenshot shows the CARIS software interface for 'Michael Farrington' under 'Cymh Outreach (1289) Active'. The left sidebar has a 'Case Notes' section expanded, showing options like General Alerts, Attach File, Client-Based Consultation, etc. The main window is titled 'Session Notes'. It includes fields for Date (9/14/2005), Start Time (12:00 AM), Duration (02:00), Appointment Type (Client), Topic/Subject (job), Mode of Meeting (Face to Face), Member (One, Ann_3 (Case Manager)), Affiliate, Notes (Michael asked for someone to help him with his resume. I will try to find someone with the time.), Attachment, and Goals & Objectives (GOAL: Youth Placement, OBJECTIVE: Help him retain his own aptment). At the bottom are 'Create Note' and 'Cancel' buttons. A large black arrow points from the number '6)' at the bottom right towards the 'Add' button in the Member section of the form.

**Add a note with details of the Session.
Attach documents if you wish to.
Click on “Create Note”**

The screenshot shows the CARIS software interface for 'Michael Farrington' under 'Cymh Outreach (1289) Active'. The left sidebar has a 'Case Notes' section expanded. The main window is titled 'Activities Display' and shows a list of 'Session Notes Recorded by Ann (2005-09-14 10:43)'. There is an 'Edit' button next to the list. At the bottom right of the main window, it says 'Page(s): 1'. A small black arrow points from the text 'The record will display in the “Activities” file.' towards the 'Edit' button.

The record will display in the “Activities” file.

3.4.9 PRESENTING ISSUES

This form allows you to record various issues on an on-going basis.
To record an issue:

**Expand “Case Notes”
Click on “Presenting Issues”**

The screenshot shows the CARIS software interface. The top navigation bar includes 'Clients', 'Search', 'Adv Search', and 'Help'. The main title is 'Program B (35749) Referral' with a warning icon. On the left, a sidebar menu under 'Case Notes' has 'Presenting Issues' selected. The central panel is titled 'Presenting Issues' and contains a dropdown menu listing various issues like 'Alcohol and Drug Abuse', 'Allergies', etc. Fields for 'Reported by' (set to 'Head Injury'), 'Date' (set to '9/22/2005'), and a 'Note' area ('Just snacks all the time.') are visible. A 'Attachments' section is at the bottom.

A variety of issues is- provided. You may select one or more of these issues.

**Select an Issue
Click “Add”**

The screenshot shows the same CARIS software interface as above, but with a single issue selected in the dropdown: 'Eating Problems'. The 'Reported by' field is now set to 'Smith, Ann', and the note field contains the same text as before: 'Jason won't eat proper meals, just snacks all the time.' The 'Attachments' section remains empty.

**Complete the rest of the form
Click on “Create Note”**

The issue information is added to the Case Activities file.

3.5 ALERTS

The system provides for tagging client files with Alerts. With a Client and Case in context, the Alerts functions will be available on the Navigation Tree.

3.5.1 CREATING A GENERAL ALERT

Clicking on General Alerts to bring up the General Alerts information window.

To add an alert to a client's file:

**Click on the “Add Alert” button
Select the type of Alert from the drop down list
Enter any pertinent information in the “Notes” field.
Click Submit/Save**

The screenshot shows the CARIS software interface. On the left, a navigation tree is open under the 'Alerts' category. A red box highlights the 'Alert Type' section. In the center, a 'Create Alert' form is displayed. The 'Type' dropdown is set to 'Sexually Intrusive'. The 'Notes' field contains the text 'Don't turn your back on him for a second!'. At the bottom right of the form are 'Submit/Save' and 'Cancel' buttons. A red box highlights the 'Submit/Save' button.

The Alert is now attached to the client's file and a red "A" by his name in the Context Field is displayed to let you know that an alert has been generated. Click on the "Note" icon to display the attached note.

The screenshot shows the CARIS software interface. On the left, a navigation tree is open under the 'Alerts' category. A red box highlights the 'Alert Icon' next to Jason Marceau's name. In the center, a 'General Alerts (of Marceau, Jason)' list is shown. One alert is listed: Type: Sexually Intrusive, Creator: Smith, Ann, Start Date: 2005-09-22, End Date: (empty), Notes: 'Don't turn your back on him for a second!'. At the bottom right of the list are 'Edit' and 'Delete' buttons. A red box highlights the 'Delete' button. Another red box highlights the 'Alert Note' link at the bottom right of the page.

3.5.2 CREATING A SUPERVISION ALERT

A supervision alert is a temporary alert generated to indicate that the client requires some special attention or supervision for a period of time. (Only used in VHRP program at present)

To create a Supervision Alert:

Expand "Alerts" in the navigation tree and:
Click on "Supervision Alert".

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835)

VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Supervision Alerts (Charlton, Robert)

Type	Creator	Start Date	End Date	Notes
Special Attention	Villeneuve, Ann	2005-10-19		Edit

Page(s): 1

[Add Alert](#)

Click on “Add Alert”

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835)

VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Supervision Alert

Start Date: 2005-11-07 End Date:

Supervision Alert Type:

Notes:
he's showing signs of depression, please keep an eye on him.

Add Attachment:

[Submit/Save](#) [Cancel](#)

Select the Alert Type from the Drop Down List
 Add any Notes you wish to describe the nature of the alert
 Add any attachments

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835)

VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Supervision Alert

Start Date: 2005-11-07 End Date: 11/18/2005

Supervision Alert Type:

Notes:
he's showing signs of depression, please keep an eye on him.

Add Attachment:

[Submit/Save](#) [Cancel](#)

Click “Submit/Save”

The screenshot shows the CARIS software interface. At the top, it displays "CARIS" and the login information "Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM". The main title is "VHRP (65862) Active" with a yellow warning icon. Below the title, there are links for "Summary", "Participants", "Case Plan", "Activities", and "Close". On the left, a navigation tree under "CARIS" includes "Waiting Lists", "Beds", "Eligibility Lists", "Reports", "Organization Notes", "Case Notes", "Alerts", and "Case Forms". The "Alerts" node is expanded, showing a list titled "Supervision Alerts (Charlton, Robert)". This list contains two entries:

Type	Creator	Start Date	End Date	Notes
Special Attention	Villeneuve, Ann	2005-10-19		Edit
Special Attention	Villeneuve, Ann	2005-11-07	2005-11-18	Edit

At the bottom right of the alert list, there is a link "Page(s): 1" and a button "Add Alert".

The Supervision Alert icon will be displayed until the “End Time” is reached or the alert removed, and the Alert will be listed.

3.6 CASE FORMS

(Only used in VHRP program at present)

The Case Forms function provides standardized forms for recording medication information specific to a Client and Case. Note that this function is only visible in the Navigation Tree when a Case is “In Context”

3.6.1 RECORDING THE ADMISSION INTERVIEW

The Admission Interview contains the demographic and personal information of the Client as recorded by the admitting person or the Case Manager.

To Record the Admission Interview:

With the Client and Case in Context:

**Expand the “Case Forms” list on the navigation tree.
Click on “Admission Interview”**

The Admission Interview window will display.

Note that once an Admission Interview has been performed for a specific Client and Case, opening this window will display an “Update Admission Interview” window since you can only have one Admission Interview for one Client/Case combination.

Victory Hill Residential Program (56100) Pre-Admit

Admission Interview

Placement Information

Placement Type: Short term Long term

Child Awareness of reasons for placement at VHRP: Yes No

Child's reaction to placement at VHRP: good

Location of Family: Outside Lower Mainland

Level of Supervision Required: General Supervision

Additional Special Needs: Visual Impairment

Hearing Loss History

Emotional and Behavioral Development

Family and Social Relationships

Health Information

Education & Cognitive Assessment

Child's Interests & Cultural Needs

Record **Cancel**

**Complete the Form, providing as much detail as necessary.
Click “Record”**

The Interview Form will be recorded and displayed in the “Activities” window.

Victory Hill Residential Program (56100) Pre-Admit

Activities Display

Activity Filter: All Activities

Page(s): 1

Admission Interview by Ann (2005-10-13 10:45) **Edit**

3.6.2 BUDGET NOTES

The Budget Note feature allows you to keep track of expenditures incurred pertaining to your Cases. It is only available when a Case is “In Context”.

To make a budget entry:

Open “Budget Notes” under “Case Forms”

**Complete the form
Click Create Note**

The Budget Note has been added to the Budget Note List.

3.6.3 GENERATING THE CARE PLAN CHECKLIST

The Care Plan Checklist is a form that contains a number of questions and responses to help analyse and understand the Client's needs and attributes when setting up a Care Plan.

**To Generate a Care Plan:
With the Client and Case in Context:**

**Expand the “Case Forms” list on the navigation tree.
Click on “Care Plan Checklist”**

The Care Plan Checklist Summary window will display.

The screenshot shows the CARIS software interface. At the top, it displays the login name 'Ann@PSDHH' and login time '10/13/2005 10:37:27 AM'. The main title is 'Victory Hill Residential Program (56100) Pre-Admit'. On the left, there's a navigation menu under 'CARIS' with sections like Waiting Lists, Beds, Eligibility Lists, Reports, Organization Notes, Case Notes, Alerts, and Case Forms. Under Case Forms, 'Care Plan Checklist' is listed. The main content area is titled 'Care Plan Checklist Summary' and contains a table with columns for Date, Type, and Period. A button 'Add Checklist' is visible at the bottom right.

You can have more than one checklist for a given Client and Case since the information contained and recorded in the checklist may change over time and require updating without deleting the original information.

To create a new checklist:

Click on "Add Checklist"

The checklist will display.

The screenshot shows the 'Care Plan Checklist' form for Jason Marceau. It includes fields for 'Type' (set to 'Initial'), 'Period' (a dropdown menu), and 'Date' (set to '10/13/2005'). The main area is a grid with rows labeled from 1 to 6. Each row has a checkbox labeled 'n/a = 0' followed by four radio buttons numbered 1, 2, and 3. Below this grid is a list of categories: B. Relationship with Family, C. Relationship with Others, D. Health and Self Care, E. Activities of Daily Living, F. Educational and Vocational, G. Recreational and Cultural, H. Spiritual and Moral Development, and I. Community Service. At the bottom right are 'Save' and 'Cancel' buttons.

Fill in as much of the form as you can or need for your purposes
Click "Save"

The Checklist will be saved and recorded in the Checklist Summary.

Care Plan Checklist Summary

Date	Type	Period
2005-10-13	Initial	Nov

Page(s): 1

Add Checklist

3.6.4 CREATING THE INDEPENDENT LIVING ASSESSMENT (ILS)

The ILS is a form that provides information to help in assessing a Client's ability to perform the necessary functions and activities to live independently.

To make the Assessment;

With the Client and Case in Context:

**Expand the “Case Forms” list on the navigation tree.
Click on “Independent Living (ILS) Assessment”**

The ILS Assessment window will display.

Independent Living (ILS) Assessment

Start Date	Type	Period

Page(s): 1

Add

You can have more than one checklist for a given Client and Case since the information contained and recorded in the checklist may change over time and require updating without deleting the original information.

To create a new checklist:

Click on “Add”

The checklist will display.

The screenshot shows the CARIS software interface for the Victory Hill Residential Program (56100) Pre-Admit. The left sidebar has a 'CARIS' section with 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Reports', 'Organization Notes', 'Case Notes', 'Alerts', and 'Case Forms' expanded. Under 'Case Forms', there are links for 'Admission Interview', 'Budget Notes', 'Care Plan Checklist', 'Independent Living (ILS) Assessment', 'Medications', and 'OTC Checklist'. The main area is titled 'Record ILS Assessment'. It has dropdowns for 'Assessment Type' (set to 'Initial') and 'Assessment Period' (set to 'March'). A date field shows '10/13/2005'. Below these are two sections of tables: 'Organizational/Planning Skills' and 'Responsibilities'. The 'Organizational/Planning Skills' table lists items like 'Planning & Goal Setting', 'Time Management', etc., with a 'n/a = 0' header. The 'Responsibilities' table lists items like 'Financial Management & Investment', 'Chores', etc. At the bottom right are 'Record' and 'Cancel' buttons.

Fill in as much of the form as you can or need for your purposes
Click "Save"

The Checklist will be saved and recorded in the Checklist Summary.

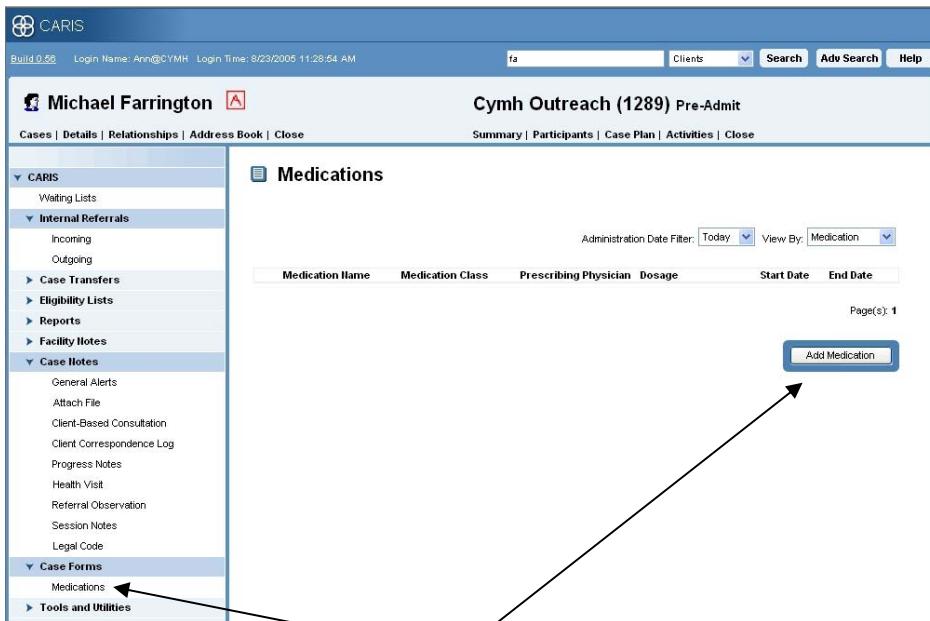
The screenshot shows the CARIS software interface for the Victory Hill Residential Program (56100) Pre-Admit. The left sidebar is identical to the previous screenshot. The main area is titled 'Independent Living (ILS) Assessment'. It shows a table with one row: 'Start Date' (2005-10-13), 'Type' (Initial Assessment), and 'Period' (March). There are 'View' and 'Delete' buttons next to the table. Below the table is a note 'Page(s): 1'. At the bottom right is an 'Add' button.

3.6.5 LOGGING MEDICATIONS

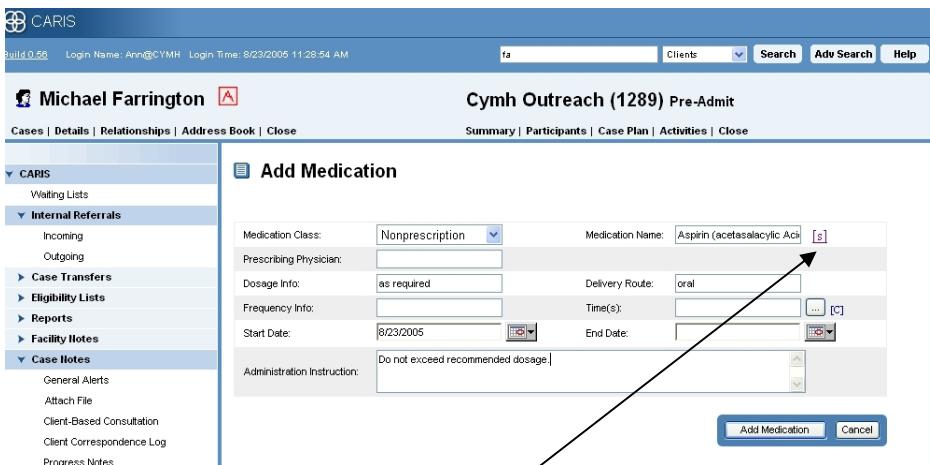
Medications may be prescription or non-prescription.

To log the prescribed or suggested medications:

Open “Medications” in the navigation tree, under “Case Forms”



**Click “Add Medication”
Fill in the fields as completely as possible.**



NOTE: To ensure correct medication description, a “Search” option is provided.

Click on the [s]

When you type in a generic term, the code selector will provide you with the more specific options.

**Select the one that is applicable
Click “Select”**

The selected medication will appear in the “Medication Name” field.

When all the required information is entered,

Click “Add Medication”

The medication will display in the medication summary window.

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetosalicylic Acid)	Non-Prescription	as recommended		2005-08-23	2005-09-30

The summary can be expanded by clicking on the “+”.

3.6.6 RECORDING ADMINISTRATION OF MEDICATION.

In the expanded medication summary, there is a button labeled “Administer”.

To record the administration of this medication:

Click “Administer”

**9) Fill in the fields
10) Click “Save”**

The administration record will be saved to the “Activities” record attached to this client/case file.

This screenshot shows the CARIS software interface. The top navigation bar includes 'CARIS', 'Build 0.66', 'Login Name: Ann@CYMH', 'Login Time: 8/23/2005 11:28:54 AM', and links for 'Clients', 'Search', 'Adv Search', and 'Help'. The main title is 'Michael Farrington' under 'Cymh Outreach (1289) Pre-Admit'. Below the title are links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A summary bar includes 'Summary', 'Participants', 'Case Plan', 'Activities', and 'Close'. The left sidebar has a tree view with nodes like 'CARIS', 'Waiting Lists', 'Internal Referrals' (selected), 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes' (selected), 'Case Forms' (selected), 'Medications', and 'Tools and Utilities'. The main content area is titled 'Activities Display' and contains a 'Medication Intervention' section with tables for 'Time Detail' and 'Participant Detail'. The 'Time Detail' table shows 'Activity Date' as 2005-08-23T11:47:00 and 'Critical Date' as 2005-08-23T11:47:00. The 'Participant Detail' table shows 'Recording Person' as One, Ann_3, 'Organization' as Child and Youth Mental Health_2, and 'Target Client' as Farrington, Michael. A page number 'Page(s): 1' is at the bottom right.

3.6.7 DELETING A MEDICATION ADMINISTRATION RECORD

Should you make an error when recording the administration of a medication, you can correct the error by deleting that particular record and re-administering the medication.

**Open the Medication Record
Locate the specific medication administration record you wish to delete.
Click “Delete”**

This screenshot shows the CARIS software interface. The top navigation bar includes 'CARIS', 'Build 0.66', 'Login Name: Ann@CYMH', 'Login Time: 8/25/2005 11:13:41 AM', and links for 'Clients', 'Search', 'Adv Search', and 'Help'. The main title is 'Michael Farrington' under 'Cymh Outreach (1289) Pre-Admit'. Below the title are links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A summary bar includes 'Summary', 'Participants', 'Case Plan', 'Activities', and 'Close'. The left sidebar has a tree view with nodes like 'CARIS', 'Waiting Lists', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Case Forms' (selected), 'Medications' (selected), and 'Tools and Utilities'. The main content area is titled 'Medications' and shows a table of medication administration records. The table columns are 'Medication Name', 'Medication Class', 'Prescribing Physician', 'Dosage', 'Start Date', and 'End Date'. One record is listed: 'Aspirin (acetasalicylic Acid)' with 'Non-Prescription' class, 'as recommended' dosage, and dates from 2005-08-23 to 2005-09-30. Below the table are fields for 'Frequency', 'Delivery Route', 'Times', 'Note', and buttons for 'Discontinue' and 'Administer'. A 'Delete' button is also present. A 'Page(s): 1' indicator is at the bottom right.

The delete administration form will display.

**Fill in the fields
Click “Save”**

Cymh Outreach (1289) Pre-Admit

Delete Medication Administration

Medication Name: Aspirin (acetosalicylic Acid) Code: Administered
 Date: 2005-08-25 Time: 12:00:00 PM
 Reason Code: Time Mistyped
 Notes: wrong time inserted

Save Cancel

The deleted item will show up in the medication summary, but will be crossed out. The reason can be checked later by passing the cursor over the item, and a summary will display.

Cymh Outreach (1289) Pre-Admit

Medications

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetosalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30
Frequency: as recommended	Admin Date	Admin Time	Admin Code	Admin By	Note
Delivery Route: oral	2005-08-25	11:15:00	Administered	One, Ann_3	
Times: 9:00 AM, 5:00 PM, 9:00 PM	2005-08-25	12:00:00	Administered	One, Ann_3	
Note:					

Administration Date Filter: Today View By: Medication

Discontinue Administer Delete

Page(s): 1 Add Medication

3.6.8 DISCONTINUING A MEDICATION

To discontinue a medication:

Open and expand the applicable medication.
 Click "Discontinue"

CARIS

Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington [A]

Cases | Details | Relationships | Address Book | Close

Cymh Outreach (1289) Pre-Admit

Summary | Participants | Case Plan | Activities | Close

Medications

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetosalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30
Frequency:	as recommended	Admin Date	Time	Admin Code	Admin By
Delivery Route:	oral	2005-08-25	11:15:00	Administered	One, Ann_3
Times:	9:00 AM, 5:00 PM, 9:00 PM	2005-08-25	12:00:00	Administered	One, Ann_3
Note:	<input type="button" value="Delete"/>				
		<input type="button" value="Discontinue"/>	<input type="button" value="Administer"/>		

Administration Date Filter: Today View By: Medication

Page(s): 1

A prompt will display asking if you really want to discontinue the medication.

Click Yes

The medication will no longer be displayed on the “Medications” window.

3.6.9 CHANGING A MEDICATION

If you wish to change a medication, or any aspect of its application such as frequency, dates, times or dosage, you must delete the existing medication and add a new one. This is for legal and medical practice reasons.

To change a Medication:

Open the Medication file.
Select the medication you wish to change
Expand it

CARIS

Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington [A]

Cases | Details | Relationships | Address Book | Close

Cymh Outreach (1289) Pre-Admit

Summary | Participants | Case Plan | Activities | Close

Medications

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetosalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30
Frequency:	as recommended	Admin Date	Time	Admin Code	Admin By
Delivery Route:	oral	2005-08-25	11:15:00	Administered	One, Ann_3
Times:	9:00 AM, 5:00 PM, 9:00 PM	2005-08-25	12:00:00	Administered	One, Ann_3
Note:	<input type="button" value="Delete"/> <input type="button" value="Delete"/>				
		<input type="button" value="Discontinue"/>	<input type="button" value="Administer"/>		

Administration Date Filter: Today View By: Medication

Page(s): 1

Click Delete

11) Proceed as in Section 3.7.

3.6.10 THE OTC CHECKLIST

A checklist is provided to record the use of any Over The Counter medications that the client customarily uses or intends to use. This provides a quick reference based on experience or other evidence concerning the client's compatibility with or success with OTC medications.

**Expand Case Forms
Click on Medication Management
Click on OTC Checklist**

The screenshot shows the CARIS software interface. At the top, there is a blue header bar with the CARIS logo, login name (Ann@YFY), login time (9/22/2005 3:45:08 PM), and navigation buttons for Clients, Search, Adv Search, and Help. Below the header, the main window displays a case summary for "Program B (35749) Referral" for "Jason Marceau". The left sidebar contains a navigation tree with categories like YFV CARIS, Case Forms, and Medication Management. Under Medication Management, the "OTC Checklist" option is selected. The main content area is titled "OTC Checklist Summary" and contains a table with columns for Date, Signed-Off by Physician, and Placed in Client's Central File. A small "Add" button is located in the bottom right corner of this section. An arrow points from the text "Click 'Add'" to this "Add" button.

Since no Checklist is shown:

Click "Add"

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 3:45:08 PM Clients Adv Search Help

Jason Marceau A

Cases | Details | Relationships | Address Book | Close

Program B (35749) Referral

Summary | Participants | Case Plan | Activities | Close

OTC CheckList

Date: 9/22/2005

Name	Comment
1. Advil	<input checked="" type="radio"/> Yes <input type="radio"/> No
2. Tylenol - Chewable	<input checked="" type="radio"/> Yes <input type="radio"/> No tends to spit them out
3. Tylenol - Liquid	<input checked="" type="radio"/> Yes <input type="radio"/> No
4. Tylenol Regular	<input checked="" type="radio"/> Yes <input type="radio"/> No

A. Pain Reliever

B. Cough and Colds

C. Indigestion, Constipation, Diarrhea

D. First Aid and Others

E. Other OTC Medication

Signed off by physician? Yes No

Is the original document placement on client's central file? Yes No

The Checklist must be COMPLETELY filled in before it can be saved. In other words, all the listed items must be checked as Yes or No. A prompt will appear if you have missed any before you can Save it.

**Complete the Checklist
Click "Save"**

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 3:45:08 PM Clients Adv Search Help

Jason Marceau A

Cases | Details | Relationships | Address Book | Close

Program B (35749) Referral

Summary | Participants | Case Plan | Activities | Close

OTC Checklist Summary

Date	Signed-Off by Physician	Placed in Client's Central File	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2005-09-22	No	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Page(s): 1

The checklist will be displayed on the OTC Checklist Summary window.

4 Agency Specific Functions

Most of the functions described in this Manual are common to all the agencies using the CARIS system. Some agencies have specific requirements or business practices that only apply to them. This section contains some activities which are agency specific.

4.1 PERFORMANCE QUALITY IMPROVEMENT (PQI) AUDIT

The Performance Quality Improvement Audit the reviewers uses for reviewing client files, outcome measure reviews, critical incidents, satisfaction surveys and client or staff complaints/feedback.

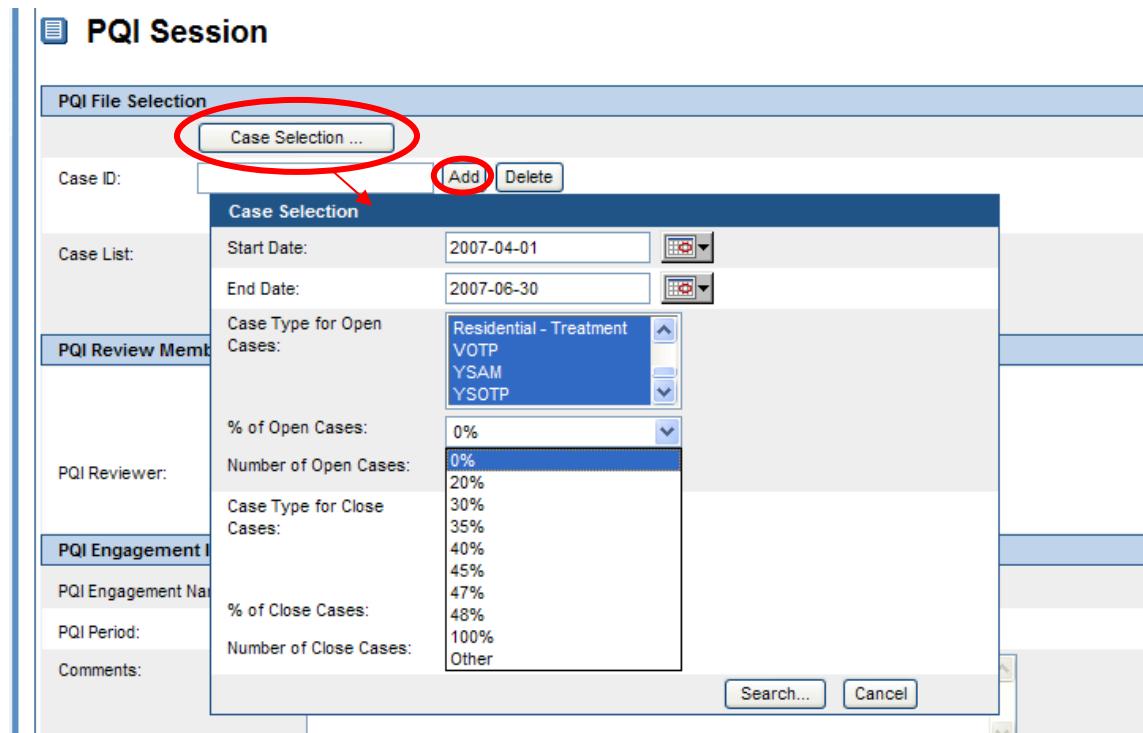
4.1.1 CREATING A PQI SESSION

Click "PQI" on left menu on CARIS context

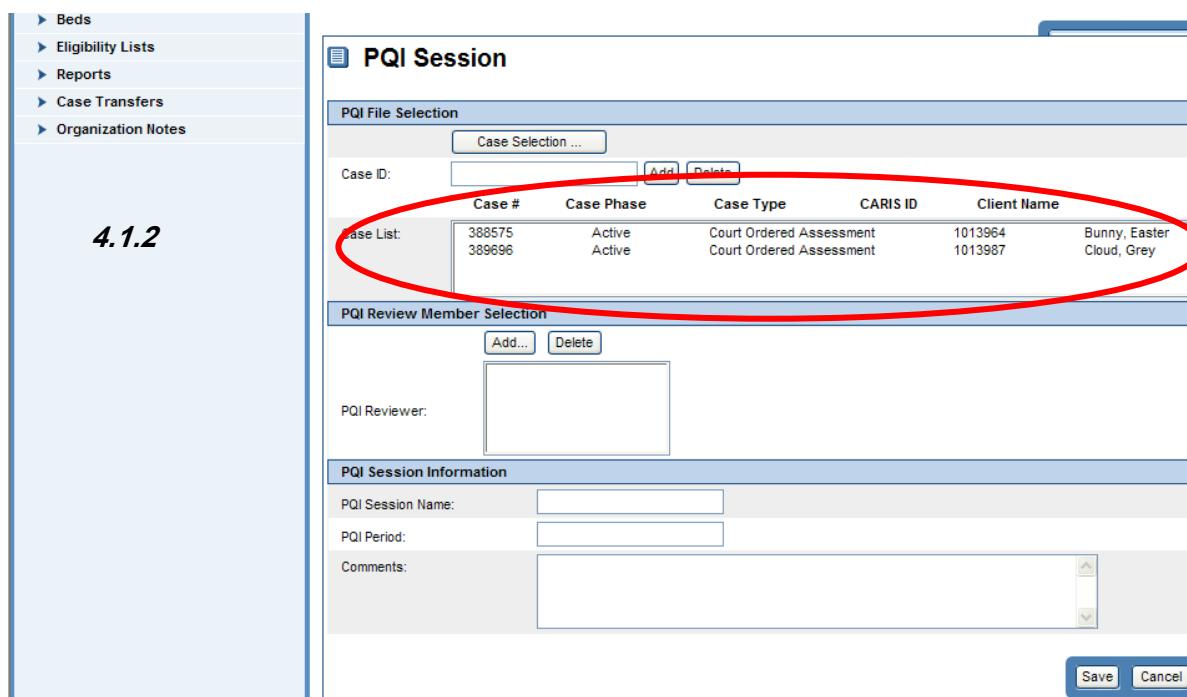
Click "Add PQI Session" to set up quarterly reviews

The screenshot shows the CARIS 1.4.26 software interface. At the top, there is a header bar with the CARIS logo, login information (Login Name: SUZIE SALT, Login Time: 4/29/2008 11:14:58 AM), and navigation buttons for Clients, Search, Adv Search, and Help. Below the header is a main menu bar with Main, Activities, and My Cases options. The left side features a sidebar with a tree view of agency-specific functions. Under the 'PQI' node, several items are listed: Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Case Transfers, and Organization Notes. The 'PQI' node itself is highlighted with a red circle. To the right of the sidebar is a large content area titled 'PQI Sessions'. It contains a table with columns for Session Name, Start Date, End Date, and Status. At the bottom right of this area is a blue rectangular button labeled 'Add PQI Session', which is also circled in red. The overall interface is light blue and white, with dark blue headers and toolbars.

Click “Case Selection”
Enter the Start and End date
Click “Case ID” to set up programs – Press Shift button or CTRL button on the keyboard and scroll the mouse to the desired programs to be reviewed
Press “20%” for both open and closed files
Click “Add”



A list of files will be shown like this:



Next, go to PQI Review Member Selection and click "Add" for adding reviewers
 Then to PQI Session Information and type in PQI Session Name box i.e. 1st quarter
 Next, PQI Period and type i.e. September 2009
 Type comments as needed (up to 6000 characters)
 Click "Save"

PQI Session

PQI File Selection

Case ID:	Case #	Case Phase	Case Type	CARIS ID	Client Name
Case List:	388575 389696	Active Active	Court Ordered Assessment Court Ordered Assessment	1013964 1013987	Bunny, Easter Cloud, Grey

PQI Review Member Selection

PQI Reviewer:
DALE & SIMON

PQI Session Information

PQI Session Name:	Jan - March 2009
PQI Period:	1st Quarter 2009
Comments:	This PQI session will be used for CARIS. Number of characters input = 53

Save **Cancel**

PQI Facilitator will click "View Audit Information" to confirm a list of reviewers

View Audit Information

Export PDF

Case ID	View Date	Member ID
384291	2009-03-01	IDIR\CARTRN01
384291	2009-03-11	IDIR\CARTRN01

Cancel

PQI reviewers can begin auditing cases

4.1.2 REVIEWING FILES (BEGIN THE SESSION)

Click “PQI” on the left menu. PQI Session page will be shown:
Click “View” to open the session

Main | Activities | My Cases

PQI Sessions

Session Name	Start Date	End Date	Status
Jan - May 2009	2009-05-07		Active

View

Page(s): 1

Add PQI Session

The screenshot shows the PQI Sessions page. On the left, there is a navigation menu under the CARIS section with "PQI" selected. The main content area displays a table of sessions. One session, "Jan - May 2009", is listed with a start date of 2009-05-07 and an end date of null, in an Active status. A red circle highlights the "View" button next to the session name.

Click “View Case” to print a case review report

CARIS

PSDH

Main | Activities | My Cases

PQI Sessions

Session Name	Start Date	End Date	Status
Test	2009-03-01		Active

Quantitative Aggregate Report Session Review Audit Report Delete Print

CASE ID	Case Type	Client ID	Client Name	Review Status
384291	Administration	1013838	Who, Seany Frank	Pending

Open View Case Case Review

Page(s): 1

Add PQI Session

The screenshot shows the same PQI Sessions page as above, but now it includes a list of cases under the "Test" session. One case, "384291 Administration 1013838 Who, Seany Frank Pending", is listed. A red circle highlights the "View Case" link next to the case details.

Click “PQI Case Review Report” on REPORTS menu. Click “Export PDF” hyperlink and print.

The document will provide dates for each activity and guide the reviewers to find the necessary information quicker

The screenshot shows the CARIS software interface with the following details:

- Header:** CARIS 1.4.60, Login Name: TRAINING_01 CARIS, Login Time: 3/11/2009 1:37:04 PM, PSDHH.
- Navigation:** Cases | Details | Relationships | Address Book | Edit History | Close. A red circle highlights the "Reports" link in the left sidebar.
- Title:** Administration (384291) [Read-Only] Referral. Summary | Participants | Case Plan | Case History | Close.
- Section:** PQI Case Review Report. A red circle highlights the "Export PDF" link at the top right of the report area.
- Content:** PQI Case Review Report. Preview Date: 2009-03-11, Generated By: TRAINING_01 CARIS. Case Type: Administration, Location: PSDHH. A table lists activities with counts: Admission Interview (0), Assessment (0), Audits (0), Bed Reservation (0), Budget Note (0), Care Plan Checklist (0), Client-Based Consultation (0), Correspondence Log (0), Discharge Activity (0), Eligibility List Enrollment (0).
- Bottom:** Done, Internet | Protected Mode: On, 100%.

After reviewing and making notes for each activity, reviewers need to:

Click “Case Review” to open the evaluation list

The screenshot shows the CARIS software interface with the following details:

- Header:** CARIS 1.4.60, Login Name: TRAINING_01 CARIS, Login Time: 3/11/2009 1:37:04 PM, PSDHH.
- Navigation:** Cases | Details | Relationships | Address Book | Edit History | Close. A red circle highlights the "Reports" link in the left sidebar.
- Title:** Main | Activities | My Cases.
- Section:** PQI Sessions. A red circle highlights the "Case Review" link in the table row for case ID 384291.
- Content:** PQI Sessions table:

Session Name	Start Date	End Date	Status	Action Buttons
Test	2009-03-01		Active	[Close]

CASE ID	Case Type	Client ID	Client Name	Review Status	Action Buttons
384291	Administration	1013838	Vho, Seany Frank	Pending	[Open] [View Case] [Case Review]
- Bottom:** Page(s): 1, Add PQI Session, Internet | Protected Mode: On, 100%.

Case Review

Questions	Electronic File	Paper File	Comments
Phase Transition:	Meets Standards	Not Applicable	Type comments here
Intake/Presenting Issues:			
Case Plans:			
Regular Recording of Case Notes:			
Required Documents Attached to Case:			
Regular Contact:			
Supervisor Review:			
OTC Completed:			
Incident Report:			
ROI/Consents:			
Discharge/Aftercare:			
Service Needs Addressed:			
	Does Not Meet Standards	Meets Standards	
	Needs Review		
	Not Applicable		

Put notes on each activity. Fill each box (Electronic File & Paper File) as required. Comment boxes are optional – make notes as needed

For each box, you will need to choose one of the following:

Does Not Meet Standard

Meets Standard

Needs Review

Not Applicable

ROI/Consents:	Does Not Meet Standards	Not Applicable
Discharge/Aftercare:	Meets Standards	Meets Standards
Service Needs Addressed:	Meets Standards	Meets Standards
Attachments: (Max file size: 1MB)	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add"/> <input type="button" value="Detach"/>	
<input type="button" value="Save"/> <input type="button" value="Finalize"/> <input type="button" value="Cancel"/>		

**Click “Save” to save your comments and return later for additional notes
Click “Finalize” when you are satisfied with your comments**

The information will appear as shown:

Main | Activities | My Cases

PQI Sessions

Session Name	Start Date	End Date	Status		
Test	2009-03-01		Active	Close	
Quantitative Aggregate Report Session Review Audit Report Delete Print					
CASE ID	Case Type	Client ID	Client Name	Review Status	
384291	Administration	1013838	Who, Seany Frank	Reviewed	Close View Case Case Review

Case Review Details:

Question	Answer	for	Notes
Phase Transition:	Meets	Meets	Standards Standards
Intake/Presenting Issues:	Does Not	Does Not	Meets Meets
Case Plans:	Needs	Needs	Review Review
Regular Recording of Case Notes:	Not	Not	Applicable Applicable
Required Documents Attached to Case:	Does Not	Meets	Standards Standards
Regular Contact:	Needs	Not	Review Applicable
Supervisor Review:	Does Not	Meets	Meets Standards
OTC Completed:	Needs	Not	Review Applicable
Incident Report:	Does Not	Needs	Meets Review
ROI/Consents:	Meets	Not	Standards Applicable
Discharge/Aftercare:	Standards	Meets	Meets Standards
Service Needs Addressed:	Standards	Meets	Standards Standards

Page(s): 1 [Add PQI Session](#)

Done Internet | Protected Mode: On 100%

PQI Facilitator can keep track of which files have been completed by clicking “Audit Report.”

Main | Activities | My Cases

PQI Sessions

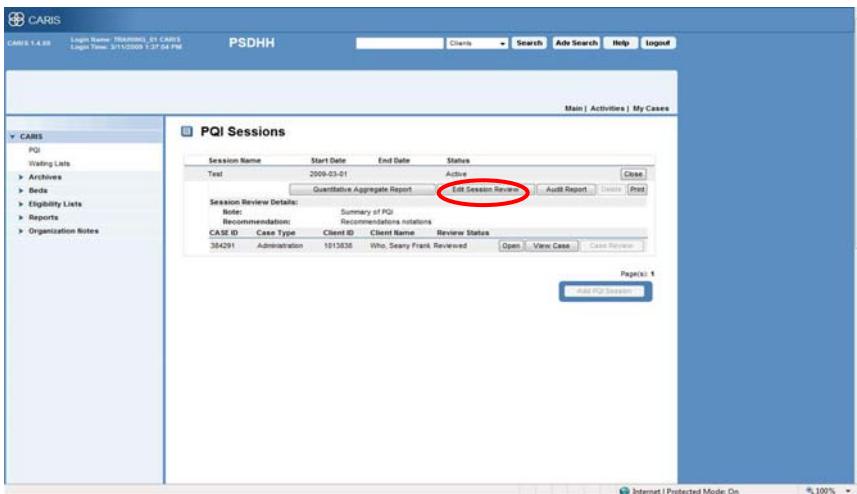
Session Name	Start Date	End Date	Status		
Test	2009-03-01		Active	Close	
Quantitative Aggregate Report Session Review Audit Report Delete Print					
CASE ID	Case Type	Client ID	Client Name	Review Status	
384291	Administration	1013838	Who, Seany Frank Pending	Open	View Case Case Review

Page(s): 1 [Add PQI Session](#)

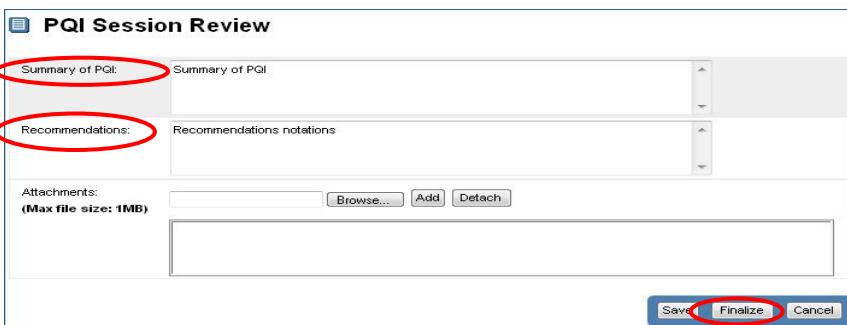
Internet | Protected Mode: On 100%

4.1.3 CLOSING THE PQI SESSION

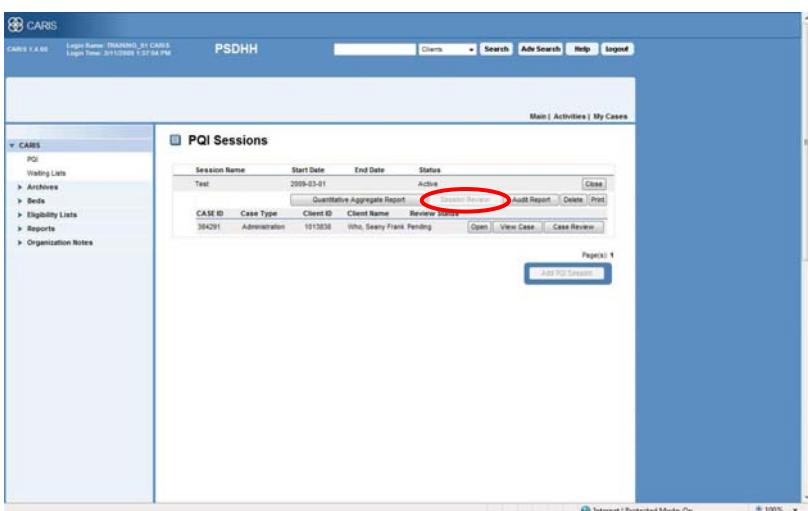
Click “Session Review”



PQI Facilitator puts a final word on boxes based on reviewers' input
The window can be edited or saved until the “Finalize” is clicked



Click the “Session Review”



The session is complete

The screenshot shows the CARIS PSDHH software interface. The left sidebar has a 'CARIS' section with 'PQI' expanded, showing 'Waiting Lists', 'Archives', 'Beds', 'Eligibility Lists', 'Reports', and 'Organization Notes'. The main content area is titled 'PQI Sessions' and displays a table with one row. The row contains 'Session Name: Test', 'Start Date: 2009-02-01', 'End Date: 2009-02-01', and a status column with 'Completed' (which is circled in red). There is also a 'View' button and a 'Page(s): 1' indicator. At the bottom right of the main area is a 'Add PQI Session' button.

4.2 BED ADMINISTRATION

The Bed Administration functions enable an organization to manage a complex residential facility with a diversity of units or wards, rooms and bed types. The Bed Administration function allows you to add and remove beds, rooms and units and change the designation of beds according to gender

12) Open “Administration” under “Beds” on the navigation tree.

The screenshot shows the 'Bed Administration' page. The left sidebar has a 'CARIS' section with 'Beds' expanded, showing 'Waiting Lists', 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main content area is titled 'Bed Administration' and shows a table of units. Each unit row includes a small icon, the unit name, its description, its status ('Active' or 'Deleted'), and two buttons: 'Edit' and 'Add Room'. The units listed are: PSDH Unit D, Trial Unit 2, Trial unit 4, Scenic Unit 1, CS Test Run Unit, DAO Test Run Unit, CDA Test Run Unit, VHPP Test Run Unit, YT and Admin Test Run Unit, Ryan's Unit, PSDH Unit A, PSDH Unit B, PSDH Unit C, Test Unit, and Trial Unit 1. At the bottom right of the main area is a 'Page(s): 1 2' indicator.

You will see that the solid blue lines indicate specific “Units”. When you expand a “Unit” the list of rooms will be shown, and when you expand each room, the bed information for that room displays.

4.2.1 ADDING A UNIT

Note that only authorized persons may add, remove or otherwise edit rooms, beds and units. If you are not authorized to perform these actions, the box will be grayed out and you will be unable to use it.

The screenshot shows the 'Bed Administration' page in the CARIS software. On the left, there's a navigation menu with 'CARIS' expanded, showing 'Waiting Lists', 'Beds' (which is selected), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main area is titled 'Bed Administration' and lists 15 units. Each unit has a status filter dropdown set to 'All' and an 'Add Room' button. An arrow points from the text 'Click on "Add Unit"' to the 'Add Unit' button at the top right of the list. At the bottom right of the list, it says 'Page(s): 1 2'.

Unit Name	Program	Status	Action Buttons
PSDH Unit D	Victory Hill Residential Program	Active	Edit Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit Add Room
Trial unit 4	Youth Transition, Administration	Active	Edit Add Room
Scenic Unit 1	Consultative Services	Active	Edit Add Room
CS Test Run Unit	Consultative Services	Active	Edit Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit Add Room
YT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit Add Room
PSDH Unit A	Consultative Services	Deleted	Edit Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit Add Room
Test Unit	Administration	Deleted	Edit Add Room
Trial Unit 1	Consultative Services	Deleted	Edit Add Room

Click on “Add Unit”

The Create Unit window will display.

The screenshot shows the 'Create Unit' window. On the left, there's a navigation menu with 'CARIS' expanded, showing 'Waiting Lists', 'Beds' (selected), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main area is titled 'Create Unit' and contains three input fields: 'Name' (Cottage 1), 'Program' (with options CS, DAO, SFCD), and 'Admin Status' (Active). At the bottom right are 'Save' and 'Cancel' buttons.

Enter the name of the Unit
Click on the appropriate program.
Click “Save”

The screenshot shows the CARIS software interface with the title 'CARIS' at the top. The main menu bar includes 'Clients', 'Search', 'Adv Search', and 'Help'. Below the menu is a search bar with the placeholder 'fa' and a dropdown for 'Clients'. The main content area is titled 'Bed Administration'. On the left, there's a sidebar with a tree view under 'CARIS' containing 'Waiting Lists', 'Beds' (which is expanded), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main table lists various units with columns for Name, Description, Status, and actions ('Edit' and 'Add Room'). A new unit, 'Test Unit', is listed with 'Administration' in the Name column, 'Deleted' in the Status column, and 'Edit' and 'Add Room' buttons. An arrow points from the 'Add Room' button for 'Test Unit' to the text 'The Unit is now added to the list.'

The Unit is now added to the list.

4.2.2 ADDING A ROOM TO A UNIT

A Unit will contain one or more rooms. To add a room to a Unit:

Click on “Add Room”.

The “Create Room” window will display.

Give the room a name
Click on “Save”.

NOTE: On almost every operation you perform, you will receive a prompt that asks if you really want to perform the operation. “OK” will activate the operation, “Cancel” will take you back to the previous window.

The screenshot shows the CARIS software interface with the title 'CARIS' at the top. The main menu bar includes 'Clients', 'Search', 'Adv Search', and 'Help'. Below the menu is a search bar with the placeholder 'fa' and a dropdown for 'Clients'. The main content area is titled 'Create Room'. On the left, there's a sidebar with a tree view under 'CARIS' containing 'Waiting Lists', 'Beds' (which is expanded), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The 'Create Room' dialog box is open, showing fields for 'Name' (set to 'Room 2') and 'Admin Status' (set to 'Active'). Below the dialog is a confirmation message from 'Microsoft Internet Explorer' asking 'Are you sure you want to create this room?' with 'OK' and 'Cancel' buttons. There are also 'Save' and 'Cancel' buttons on the right side of the dialog.

The newly created room will be added to the Unit on the summary page.

The screenshot shows the 'Bed Administration' section of the CARIS software. On the left, a navigation menu under 'CARIS' includes 'Waiting Lists', 'Beds' (which is selected), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main area displays a table of units and their details:

Unit	Description	Status	Action Buttons
PSDH Unit D	Victory Hill Residential Program	Active	Edit Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit Add Room
Trial unit 4	Youth Transition, Administration	Active	Edit Add Room
Scenic Unit 1	Consultative Services	Active	Edit Add Room
CS Test Run Unit	Consultative Services	Active	Edit Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit Add Room
YT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit Add Room
Cottage 1	Deaf Access Office	Active	Edit Add Room
Room 1		Active	Edit Add Bed
Room 2		Active	Edit Add Bed
PSDH Unit A	Consultative Services	Deleted	Edit Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit Add Room
Test Unit	Administration	Deleted	Edit Add Room

At the bottom right, it says 'Page(s): 1 2'.

4.2.3 ADDING A BED TO A ROOM

To add a bed or beds to a room:

Click on “Add Bed” opposite the room you wish to place it in.

The Create Bed window will display.

The screenshot shows the 'Create Bed' window. On the left, a navigation menu under 'CARIS' includes 'Waiting Lists', 'Beds' (selected), 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main area contains the following form fields:

Name:	Bed A
Type:	Regular
Gender:	Female
Admin Status:	Active

At the bottom right are 'Save' and 'Cancel' buttons.

Name the Bed

Select the type from the drop down list

Select the gender of the occupant that the bed is designated for.

Click “Save”

The bed will now be added to the room.

The screenshot shows the 'Bed Administration' section of the CARIS software. On the left is a navigation menu with 'CARIS' expanded, showing 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Reports', and 'Facility Notes'. The main area is titled 'Bed Administration' and contains a table of units, rooms, and beds. At the top right are 'Status Filter' and 'Unit Filter' dropdowns, and buttons for 'Add Unit', 'Edit', and 'Add Room'. The table lists the following data:

Unit	Description	Status	Action Buttons
PSDH Unit B	Victory Hill Residential Program	Active	Edit Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit Add Room
Trial unit 4	Youth Transition, Administration	Active	Edit Add Room
Scenic Unit 1	Consultative Services	Active	Edit Add Room
CS Test Run Unit	Consultative Services	Active	Edit Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit Add Room
YT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit Add Room
Cottage 1	Deaf Access Office	Active	Edit Add Room
Room 1		Active	Edit Add Bed
Bed A	Regular	Female	Active Edit Add Bed
Room 2		Active	Edit Add Bed
PSDH Unit A	Consultative Services	Deleted	Edit Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit Add Room
Test Unit	Administration	Deleted	Edit Add Room

4.2.4 BED MANAGEMENT

The Bed Management function opens a window that contains a list of all the units, rooms and beds available to the agency. If you are authorized to do so, you can edit any of the elements by clicking on "Edit".

The screenshot shows the 'Community Development Administration (8986) Active' profile for Michael Farrington. The left sidebar has 'CARIS' expanded, showing 'Waiting Lists', 'Beds' (selected), 'Administration', 'Management', 'Reservations', and 'Occupancy'. The main area is titled 'Bed Management' and contains a table of beds. At the top right is a 'Unit Filter' dropdown. The table lists the following data:

Bed Name	Status	Type	Gender	Note	Action Buttons
CDA Test Run Unit / Special Needs Room / B4	Active	Special Needs	Male		Edit
Cottage 1 / Room 1 / Bed A	Active	Regular	Female		Edit
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male		Edit
CS Test Run Unit / Boy room / B1	Active	Regular	Male		Edit
CS Test Run Unit / Boy room / B2	Active	Regular	Male		Edit
CS Test Run Unit / Boy room / B3	Active	Regular	Male		Edit
CS Test Run Unit / Boy room / B4	Active	Regular	Male		Edit
CS Test Run Unit / Extra room / B1	Active	Regular	Any		Edit
CS Test Run Unit / Extra room / B2	Active	Regular	Any		Edit
CS Test Run Unit / Extra room / B3	Active	Special Needs	Any		Edit
CS Test Run Unit / Extra room / B4	Active	Special Needs	Any		Edit
CS Test Run Unit / Girl Room / B1	Active	Regular	Female		Edit
CS Test Run Unit / Girl Room / B2	Active	Regular	Female		Edit
CS Test Run Unit / Girl Room / B3	Active	Regular	Female		Edit
CS Test Run Unit / Girl Room / B4	Active	Regular	Female		Edit

Note that there is possibly more than a single page of listings. The listings can be organized by clicking on the headings. In the above case they are organized by Bed Name, so the beds show up in alphabetical order. You could organize the list by Status, type or gender by clicking on the

heading. There is a filter available which will narrow the list if you know which unit you wish to view. For example, if you just want to view the “Cottage” listings,

**Open the “Unit Filter” Drop Down list
Select “Cottage 1”**

Bed Name	Status	Type	Gender	Note	Action
CDA Test Run Unit / Boy Room / B1	Blocked	Regular	Male		Edit
CDA Test Run Unit / Boy Room / B2	Active	Regular	Male		Edit
CDA Test Run Unit / Boy Room / B3	Active	Regular	Male		Edit
CDA Test Run Unit / Boy Room / B4	Active	Regular	Male		Edit
CDA Test Run Unit / Extra Room / B1	Active	Regular	Any		Edit
CDA Test Run Unit / Extra Room / B2	Active	Regular	Any		Edit
CDA Test Run Unit / Extra Room / B3	Active	Special Needs	Any		Edit
CDA Test Run Unit / Extra Room / B4	Active	Special Needs	Any		Edit
CDA Test Run Unit / Girl Room / B1	Active	Regular	Female		Edit
CDA Test Run Unit / Girl Room / B2	Active	Regular	Female		Edit
CDA Test Run Unit / Girl Room / B3	Active	Regular	Female		Edit
CDA Test Run Unit / Girl Room / B4	Active	Regular	Female		Edit
CDA Test Run Unit / Special Needs	Active	Special Needs	Any		Edit
Dawn / H4					

The Bed Management summary will now only show the bed list for Cottage 1.

Bed Name	Status	Type	Gender	Note	Action
Cottage 1 / Room 1 / Bed A	Active	Regular	Female		Edit
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male		Edit

The edit function enables you to change the status or Type from drop down lists.

Name:	Bed 1
Gender:	Male
Status:	Active
Type:	Regular
Notes:	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4.2.5 RESERVING A BED

To reserve a bed for a client you must have both the client and the case in context. Beds are sometimes assigned to specific programs, so the client may not be eligible for a bed in a unit even if one is available. In that case, you may have to open a new case for the client in a program for which beds are available, or edit the Unit via the Administration function (Section 4.2).

To make a bed reservation:

With the client and case in context,

Open “Reservations” under the “Bed” heading in the navigation tree.

The reservation page will display.

This screenshot shows the 'Bed Reservations' page. At the top, there's a header bar with the user name 'Michael Farrington' and a red info icon. Below it, a navigation bar includes links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. To the right of the navigation bar are links for 'Summary', 'Participants', 'Case Plan', 'Activities', and 'Close'. On the left, a sidebar menu under the 'CARIS' section has 'Waiting Lists' and 'Beds' expanded. Under 'Beds', options like 'Administration', 'Management', 'Reservations', and 'Occupancy' are listed. Other collapsed sections include 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Alerts', and 'Case Forms'. The main content area is titled 'Bed Reservations' and contains a table with columns: Bed Name, Client, Start Date, Time, End Date, Time, and Duration. Above the table are filters for 'Unit Filter' (set to 'All') and 'Time Filter' (set to '8/25/2005'). Below the table is a page number indicator 'Page(s): 1' and a blue button labeled 'Search Bed Availability'.

Click on “Search Bed Availability”

This screenshot shows the 'Search Bed Availability' dialog box. It has a header bar with the user name 'Michael Farrington' and a red info icon. Below it, a navigation bar includes links for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. To the right of the navigation bar are links for 'Summary', 'Participants', 'Case Plan', 'Activities', and 'Close'. On the left, a sidebar menu under the 'CARIS' section has 'Waiting Lists' and 'Beds' expanded. Under 'Beds', options like 'Administration', 'Management', 'Reservations', and 'Occupancy' are listed. Other collapsed sections include 'Eligibility Lists', 'Reports', 'Facility Notes', 'Case Notes', 'Alerts', and 'Case Forms'. The main content area is titled 'Search Bed Availability' and contains two input fields: 'Start Date' (set to '8/25/2005') and 'Minimum Duration' (set to '1'). To the right of these fields are 'Search' and 'Cancel' buttons.

Fill in the date you wish to reserve the bed for and the number of days the client will stay.
Click “Search”

Michael Farrington 

Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

RESERVATION AVAILABILITY

Name	Bed Status	Bed Type	Bed Gender	Availability Start	Duration	Select
CDA Test Run Unit / Special Needs Room / B3	Active	Special Needs	Female	2005-Aug-25	367	<input type="button" value="Select"/>
CDA Test Run Unit / Special Needs Room / B4	Active	Special Needs	Male	2005-Aug-25	367	<input type="button" value="Select"/>
Cottage 1 / Room 1 / Bed A	Active	Regular	Female	2005-Aug-25	367	<input type="button" value="Select"/>
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male	2005-Aug-25	367	<input type="button" value="Select"/>
Trial Unit 2 / Green Room / First Bed	Active	Regular	Male	2006-Feb-01	206	<input type="button" value="Select"/>
Trial Unit 2 / Green Room / Second Bed	Active	Regular	Male	2005-Aug-25	367	<input type="button" value="Select"/>
Trial Unit 2 / Lilac Room / First Bed	Active	Regular	Female	2006-Jul-13	45	<input type="button" value="Select"/>
Trial Unit 2 / Lilac Room / Second Bed	Active	Regular	Female	2005-Aug-25	367	<input type="button" value="Select"/>
Trial Unit 2 / Red Room / First Bed	Active	Special Needs	Female	2005-Aug-25	367	<input type="button" value="Select"/>
Trial Unit 2 / Red Room / Second Bed	Active	Special Needs	Male	2005-Aug-25	367	<input type="button" value="Select"/>

Page(s): 1 2

A list of all beds that meet the criteria will display.

Select the one you want
The “Create Reservation” window will display.

Michael Farrington 

Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

CREATE RESERVATION

Name:	Cottage 1 / Room 2 / Bed 1		
Start Date:	08/25/2005	<input type="button" value="..."/>	Start Time: 12:00 AM <input type="button" value="..."/>
Duration:	1		
End Date:	08/26/2005		End Time: 12:00 AM <input type="button" value="..."/>

If the client is present and ready to occupy the bed, you can proceed to assign the bed immediately (subject to current bed administration rules). Otherwise, to confirm the reservation:

Insert the appropriate “Start” and “End” time fields
Click on “Save Reservation”.

The reservation will be saved and will show on the “Reservations” window

Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Bed Reservations

Bed Name	Client	Start Date	Time	End Date	Time	Duration
Bed 1	Farrington, Michael	2005-Aug-25	00:00	2005-Aug-26	00:00	2

Unit Filter: All Time Filter: 8/25/2005

Start Date: Today

Assign Edit Delete

Page(s): 1

Search Bed Availability

The reservation will stay in this location until it is either assigned, or deleted.

4.2.6 ASSIGNING A BED

From the “Reservations” window,

Click on “Assign”

Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Assign to Bed

Client Name:	Farrington, Michael
Name:	Bed 1
Start Date Time:	2005-Aug-25 00:00
Duration:	2
End Date Time:	2005-Aug-26 00:00
Notes:	

Assign to Bed Cancel

Click on “Assign to Bed”

The client will now show up on the Bed Summary page for that program as “In Bed”.

The notification on the “Reservation” page will disappear.

The screenshot shows the CARIS software interface for Community Development Administration. The top navigation bar includes the CARIS logo, build information (Build 0.56, Login Name: training1@PSDHH, Login Time: 8/25/2005 3:03:35 PM), and links for Clients, Search, Adv Search, and Help. The main title is "Community Development Administration (8986) Active". On the left, a navigation tree under "CARIS" shows "Waiting Lists", "Beds" (selected), and various reports and forms. The "Beds" node has sub-options like Administration, Management, Reservations, Occupancy, Eligibility Lists, Reports, Facility Notes, Case Notes, Alerts, and Case Forms. The central content area is titled "Bed Summary" and displays a table of bed statuses. The table columns are Bed Name, Client Name, Client Status, Bed Status, and Days Left. Each row contains a "View" button. A unit filter dropdown at the top right is set to "All". At the bottom right, it says "Page(s): 1 2".

Bed Name	Client Name	Client Status	Bed Status	Days Left	
Trial Unit 2 / Red Room / Second Bed			Active	View	
Trial Unit 2 / Red Room / First Bed			Active	View	
Trial Unit 2 / Lilac Room / Second Bed			Active	View	
Trial Unit 2 / Lilac Room / First Bed	Brown, Gustavo	In Bed	Active	160	View
Trial Unit 2 / Green Room / Second Bed			Active	View	
Trial Unit 2 / Green Room / First Bed	Denim, Daisy	In Bed	Active	322	View
Cottage 1 / Room 2 / Bed 1	Farrington, Michael	In Bed	Active	1	View
Cottage 1 / Room 1 / Bed A			Active	View	
CDA Test Run Unit / Special Needs Room / B4			Active	View	
CDA Test Run Unit / Special Needs Room / B3			Active	View	
CDA Test Run Unit / Special Needs Room / B2			Active	View	
CDA Test Run Unit / Special Needs Room / B1	James, Robert S	In Bed	Active	225	View
CDA Test Run Unit / Girl Room / B4			Active	View	
CDA Test Run Unit / Girl Room / B3			Active	View	
CDA Test Run Unit / Girl Room / B2	Sage, Pamela	In Bed	Active	114	View

4.2.7 OCCUPANCY

Clicking on “Occupancy” in the navigation tree under the heading “Beds” will show a summary of the status of all the beds available to the program that is in context. If no case is in context it will show the summary for every bed in the system.

5 Training Plan and Scenarios

This Training Plan is intended for use with the CARIS User Manual and a working demonstration version of the CARIS System.

The Training Manual contains the following Sections.

Section 1: General Information and Getting Ready

- 13) An overview of the Training Plan
- 14) What you will need
- 15) Training Program Schedule

Section 2: Using CARIS

An overview of the system and its capabilities.

Section 3: Scenarios

Typical situations used as practice samples for the purpose of familiarization with the system.

Section 4: Evaluations

- 16) Training evaluation
- 17) Self evaluation.

Section 5: Notes

(Pages for the Trainee to make notes)

5.1 GENERAL INFORMATION AND GETTING READY

The Training Session(s) will be conducted using this Manual as a reference, and a demonstration program for practice purposes. Since the program is for demonstration purposes only, you need not be afraid of making a mistake or messing up the program. Due to the fact that CARIS is used by several different agencies, the Screen Shots in the manual and the graphic interface of the demonstration program may not be identical to the one you will actually use. Some items in the Navigation Tree as it is shown will not be available at your agency.

What you will require:

- 18) One (1) days time at the location specified, 8 hours per day.
- 19) A couple of pens
- 20) A computer terminal with a web browser (provided)
- 21) A copy of the CARIS User Manual (provided)

The location of the Training Sessions will be:

The Dates and Times are as follows:

Date: _____ Start: am. Break: to pm. End: pm.

Date: _____ Start: am. Break: to pm. End: pm.

The coordinator is: _____

Telephone: _____ **e-mail:** _____

5.2 USING CARIS

The CARIS program has been developed and implemented for the purpose of improving Client Tracking, Case Management and Documentation within the context of your Agency's activities.

5.3 SCENARIOS

The following Scenarios represent typical situations that you may encounter from day to day. Working through these Scenarios will help you to become familiar with the system and with the User manual.

Scenario 1: Roles: Mgmt., Admin., SFCD/DAO

a. Bed Management

- 22) Change Status, Type and Gender
- 23) Set up Bed (Administrative Functions)
- 24)

b. Eligibility List Management (Set up four events/ classes)

- 25) Add course to the Eligibility List
- 26) Edit a course
- 27) Delete a course
- 28) Complete a course
- 29) View Completed List, Active List and All Lists

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Scenario 2: CARIS Context Activity (all roles)

Receive a phone call, e-mail; fax; (not related to a specific client or case) record them separately in the Communication Notes.

Topic Based Consultation

You and another person present at a conference on , there were 25 people there, your presentation was for 55 minutes, 10 of those people were from early intervention agencies, 15 were teachers from around the province:

Report a false alarm (safety report)

Understand: Mostly Understand: Don't Understand:

Questions: _____

**Scenario 3: Complete a damage report where a window was broken;
(Facility report)**

Understand: Mostly Understand: Don't Understand:

Questions: _____

**Scenario 4: Case/Client Context – VH staff.....Case Context – Key Case/
Support Staff**

- 30) Phone Call from a Parent
- 31) Consulting with a community support service about the child;
- 32) Request for registration in a SFCD course (refer case to SFCD)
- 33) Child takes medication; medication not set up (add medication); staff enter the information (to completion); realizes it states the wrong time (edits to input the correct time) (one for prescription and one for non-prescription);
- 34) Record medical appointment;
- 35) Record a SIR (child injured); records conversation with parents; child seems to get worse requiring an emergency hospital visit; follow-up report made after discharge from emergency; record conversation with parent; have child take prescribed medication 3 times a day (requiring set up and recording of medication taken).
- 36) The non-prescription medication that you gave (see 'd') is having a minor adverse effect (upset stomach) on the child. You call the parents. Record the phone call and record an observation.
- 37) Problems arise when two residents are having conflict; requires relocation of one of the residents; type an 'announcement' for other staff that the child has been relocated to another place; Type in a progress note in each resident's file explaining the incident; Complete a Communication note indicating contact with each parent;

- 38) A family meeting has been scheduled because there are conflicts within the family; complete a session note;
- 39) Complete three progress notes with three different objectives.
- 40) A parent has called to express their frustration about the flight schedule for the next month. Attach their e-mail and place it on the child's files. Send a note to the day staff re: the e-mail note.
- 41) You are looking at one of your clients' case plan and you know that it needs to be updated. Take an objective and change the status from pending to complete. Add another objective to the same goal.

Understand: Mostly Understand: Don't Understand:

Questions: _____

Scenario 5: SFCD/DAO – CARIS/Client Context.... Key/Caseworker: Case context

- 42) Three messages are on the answering machine. You have responded to each call and now you are recording the three conversations where there are three open cases.
- 43) A client is requesting registration in a course for an uncle and aunt. The uncle and aunt have not been affiliated with the client. You will have to set up the uncle and aunt in the contact list and affiliate them with the client. Then you must register them in the course offering.
- 44) A client is asking about where to book interpreters in Kelowna. You call the client back and give them the phone number. You record this on your call log.
- 45) A person is calling about bus services for the physically disabled. You call back and refer them to another agency. Record the call.
- 46) A prospective client calls and is requesting services. Set up the client. You are only able to set up a basic demographic (i.e. gender, name and d.o.b.). The client will call back later. Don't open a case.
- 47) The Program Coordinator asks you to set up the Videoconference class scheduled for the fall of 2005 (eligibility management). The class must have a minimum of 5 registrations and a maximum of 10. Determine the length of the course and add other detailed information such as time, dates, day of the week, the instructor, location. Purpose of the course.
- 48) You have returned from an outreach trip on which you had no access to a computer and could not add progress notes. You met with three clients and now you want to record your observations. Create three notes for three clients.
- 49) In the middle of recording your progress notes the client from 'b' calls back with more details about the family. Open a case in the SFCD area. Complete a assessment in moving from referral to admit. Record the family members, address and other contact information. Add the family members to the case.
- 50) Return to the progress note for the second client from your outreach trip.
- 51) As you complete your second progress note a phone call comes in from a client who is upset and wants to be referred to counselling. You provide the information to the Well Being Program and record the call.
- 52) The Program Coordinator is out of the office and does not have access to a computer. She requests the address of a client. Look for the address and give it to the Program Coordinator.

- 53) Now you are able to complete your third progress note. You look up at the time and realize it is time for the family mediation. You don't have time to complete the third progress note.
- 54) You return from the family mediation and complete a session note recording all the important details.
- 55) You look at the time once again and realize it is time for a client-based consultation – a case management conference call. You are providing consultation to a school district in how to enhance accessibility for a Deaf child. You record this client-based consultation.
- 56) You finally complete the third progress note in a rush. You now have another telephone conference call with a northern police detachment who is interested in setting up a sensitivity training for their officers. You complete a topic-based consultation note.
- 57) You review your three progress notes for some reason and you realize that the information you recorded in the third note has some errors in it. You edit the note and place the correct information.

Understand: Mostly Understand: Don't Understand:

Questions: _____

Scenario 6: Mgmt., DAO/SFCD – in case context

- 58) You arrive at work after lunch having to follow up on some calls from the morning. You were unable to record the calls from this morning (there were three of them). The first was topic-based, the second and third were client related.
- 59) You return the call regarding the topic-based request. A income assistance worker is requesting information regarding how to accommodate a deaf client. You provide some topic-based consultation and record it.
- 60) The other two calls were from clients requesting assistance for finding housing and for income assistance help. Record these against your clients.
- 61) You make several calls for the housing issue. Record them (approx. 5 calls).
- 62) You make several calls for the income issue. Record them (approx 3 calls).
- 63) One of the housing calls you make is a good contact. Set up their organization.
- 64) The same occurs for income assistance.
- 65) You are on a conference call with the client who has an income issue and the income assistance worker. Client-based consultation recording.
- 66) A client comes in and meets with you. She wants to develop a training plan to get her prepared for post-secondary schooling. Progress note.
- 67)

Understand: Mostly Understand: Don't Understand:

Questions: _____

5.4 EVALUATIONS

5.4.1 TRAINING COURSE EVALUATION

Please complete these evaluations so that we can get an idea of how you feel about the course and how we might improve it for the next time.

Length of the training: Excellent Good OK Poor

Comment: _____

Content of the training: Excellent Good OK Poor

Comment: _____

Presentation of the training: Excellent Good OK Poor

Comment: _____

User Manual: Excellent Good OK Poor

Comment: _____

5.4.2 SELF EVALUATION

I now understand how the system works:

Very Well Well enough OK I don't

Comment: _____

I can use this system now in my job:

Very Well Well enough OK I can't

Comment: _____

I feel confident that I know what I need to know:

Very Well Well enough OK I don't

Comment: _____

I could use more training:

A lot some a bit none

Comment: _____

I would like to have a refresher some time in the future after I use the system for a while.

For sure Probably Maybe I don't

Comment: _____

5.4.3 UNDERSTANDING THE CARIS SYSTEM

Understand: Mostly Understand: Don't Understand:

Questions: _____

What CARIS does

Understand: Mostly Understand: Don't Understand:

Questions: _____

Security and Privacy

Understand: Mostly Understand: Don't Understand:

Questions: _____

Basic Procedures

Logging In

Understand: Mostly Understand: Don't Understand:

Questions: _____

Your Screen Display

Understand: Mostly Understand: Don't Understand:

Questions: _____

Context Bar

Understand: Mostly Understand: Don't Understand:

Questions: _____

Navigation Tree

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Main Information Area

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Client Context

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Case Context

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Searching for a Client, Contact, Member or Organization

Basic Search

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Advanced Search

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Client and Case Management

Create a new client

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find an existing client

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Edit an existing Client

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create a new contact

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find an existing contact

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Edit an existing contact

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find a member

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create a new organization

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find an existing organization

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Edit an existing organization

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create a new Relationship

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find an existing relationship

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Edit an existing relationship

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Case Management

Create a new case (referral)

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Find an existing case

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Admit a Client

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Discharge a Client

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Deactivate a case

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Add a contact to a case

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Add a Member to a Case

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Develop a Treatment Plan

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create a Goal

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create an Objective

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Create an Action plan

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Generate the Case History

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Functions

Alerts

Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

Reports

Understand: **Mostly Understand:** **Don't Understand:**

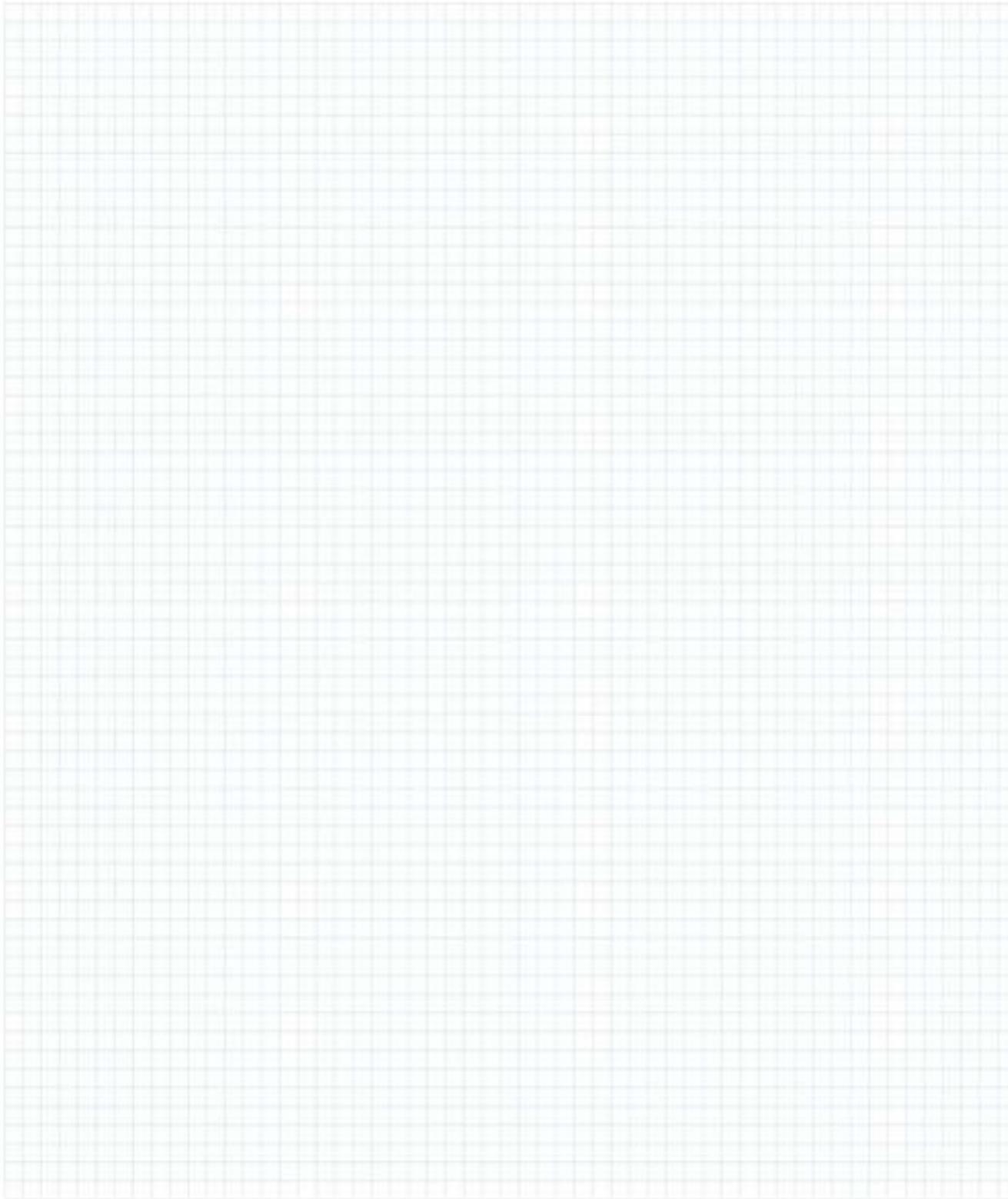
Questions: _____

Other Functions

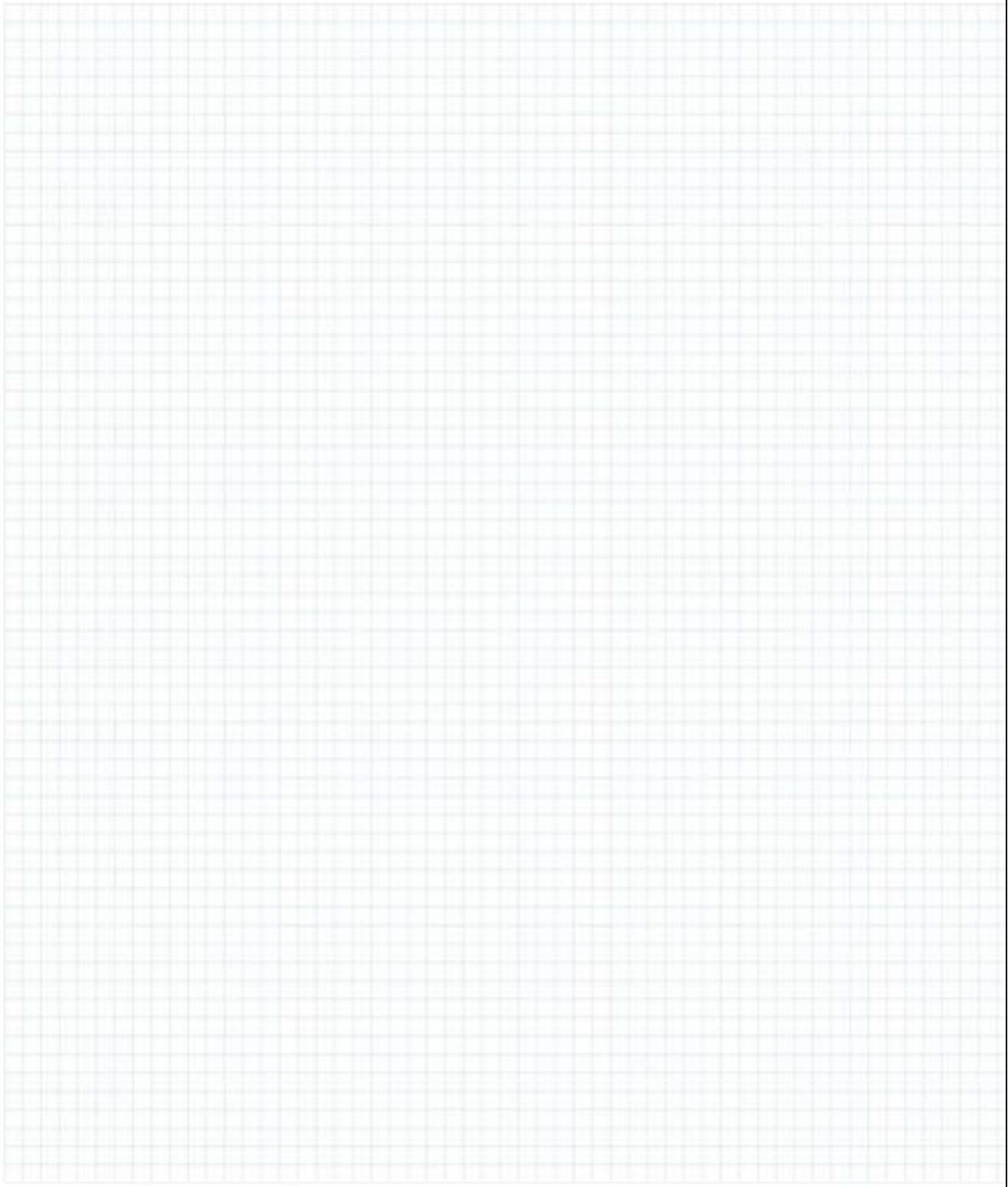
Understand: **Mostly Understand:** **Don't Understand:**

Questions: _____

5.5 NOTES



NOTES:



NOTES:



6 Glossary

The glossary defines terms used in CARIS. Sometimes the meanings are somewhat different from normal usage, but have become of special meaning within the MCFD.

Activities: A record of actions taken by the user either in a general operational sense or specific to a client or case.

Ad Hoc Reports: Reports prepared for a specific purpose, generally based on specific criteria.

Affiliate: Someone attached to a client's case who does not have access to the client's file. Typically a family member, social worker, minister or police officer.

Bed: A bed in a "Room" which may be allocated to a client.

Case Report: A Case Report is an automatically generated report that summarizes the User's cases using pre-established criteria.

Contact: A person of interest to a specific client, or of general interest. If the contact is of interest to a client, like a minister or relative, that person will be attached to a client's file as a relationship. General contacts will just be listed, like a police officer, social worker or physician – someone you may want to "contact".

Context: The term "In Context" as used in this system means the Client and/or Case whose names appear in the Context Bar.

Critical Date: The date upon which a particular event either did occur or should occur in the future.

End Date: The date upon which an event is scheduled to end.

Member: Someone attached to a client's case who is involved and who has access to the file. Normally only other case workers, clinicians, supervisors or involved professionals can be members.

Partner: A Partner is an individual or a group who is working in association with a person or group in the agency.

Recipient: A Recipient is an individual or a group who represent the "audience" for an activity or event.

Relationship: Someone attached to a client's file other than an affiliate. A "relationship" can be a contact, a member or another client. This is in general used for family members

Referral: The process of "referring" a client to another authorized person within the business domain of CARIS. with the additional element of where the individual client has come from, i.e, self referral, agency contact, walk in, etc

Referral: The process of opening a new case for a client. Basically "New Referral" means "Start a New Case".

Room: A specific room in a "Unit".

Start Date: The date upon which an event is scheduled to start.

Transfer: The process of providing responsibility for the client to another agency or receiving agency.

Unit: A "Unit" in the context of this Manual is a facility such as a house, ward, or other building containing "rooms" and "beds".

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